User Guide

XEROX DocuShare®

Release 3.1

Publication date: September 2003

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Getting started

What is DocuShare?

DocuShare is a web-based content management system that lets you use your Web browser to store, view, edit, and share information with other users across the Internet. Anyone with access to your DocuShare site can download and upload documents, create and manage repositories called collections, and create calendars, bulletin boards, and other site objects.

With DocuShare, you can:

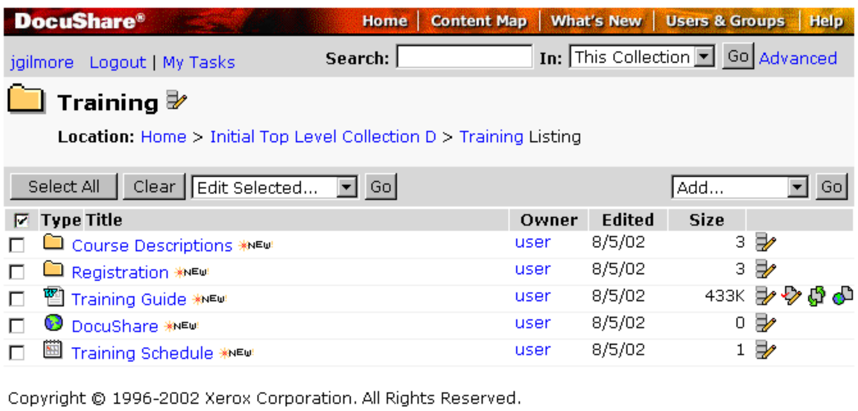
- Create and maintain your own account and workspace without the assistance of a Web master or site administrator.
- Create collections in which to store documents, in their original format, and other types of objects.
- Control user access to collections, documents, and other site objects.
- Set up subscriptions for objects to be notified of any changes, additions, and deletions.
- Maintain multiple versions of a document, track its revision history, and lock a document to prevent simultaneous editing.
- View new content on your site.
- Search for objects and content on your site.
- Automate document routing tasks.

Managing information

Your DocuShare site consists of collections and objects. A collection is like a folder; you use it to store other collections and objects. Objects can be documents, calendars, bulletin boards, and URLs, and can appear in more than one collection.

You can create any number of collections on your DocuShare site. As the user who created the collection, you are the object's owner and you can control the type of access that users have to it. You can also assign a variety of properties to the collection, which allow you to provide information about the collection to other users and to customize it.

The figure below shows the contents of a collection titled **Training**. The collection contains a number of objects including: other collections, a document, a URL to another Web site, and a calendar.



Each DocuShare object is identified by an icon. Table 1–1 shows the current DocuShare icons.

Table 1–1: DocuShare icons

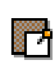
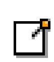
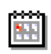
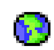
DocuShare object and its icon	
User—A registered DocuShare user. 	**Bulletin Board**—An online message board where bulletins can be posted. 
Group—One or more DocuShare users, groups, or both. 	**Bulletin**—A bulletin board message. 

Table 1–1: DocuShare icons

DocuShare object and its icon	
Collection—A container for storing DocuShare objects. 	**Saved Query**—Saved search query terms that can be used for a search. 
Document—A document stored on the DocuShare site. 	**Subscription**—Notification after a change occurs to a specified DocuShare object. 
Calendar—An online monthly or weekly calendar. 	**URL**—An Internet address for a Web page. 

Assigning information to objects

Every DocuShare object has an assigned set of properties. For example, the properties for all objects include a title, a description, and an owner. Each object has a number of specific properties. For example, the sort order property is unique to collections and documents have a maximum versions property. Your DocuShare administrator also can create custom properties for use at your site. Properties allow you to search for objects.

Controlling access to objects

You can control the level of access users and groups have to DocuShare objects by assigning permissions. A collection and the objects it contains can have the same permissions, or each object in a collection can have its own permissions. DocuShare allows you to assign these access permissions to users and groups:

- **Reader** allows the user or group to read the contents of the object and view its associated properties and permissions.
- **Writer** allows the user or group to edit the object's properties and add new objects, including new versions of documents.
- **Manager** allows the user or group to delete the object, and change the object's access permissions and owner.

Your DocuShare administrator has full access permissions to all of the objects on your site.

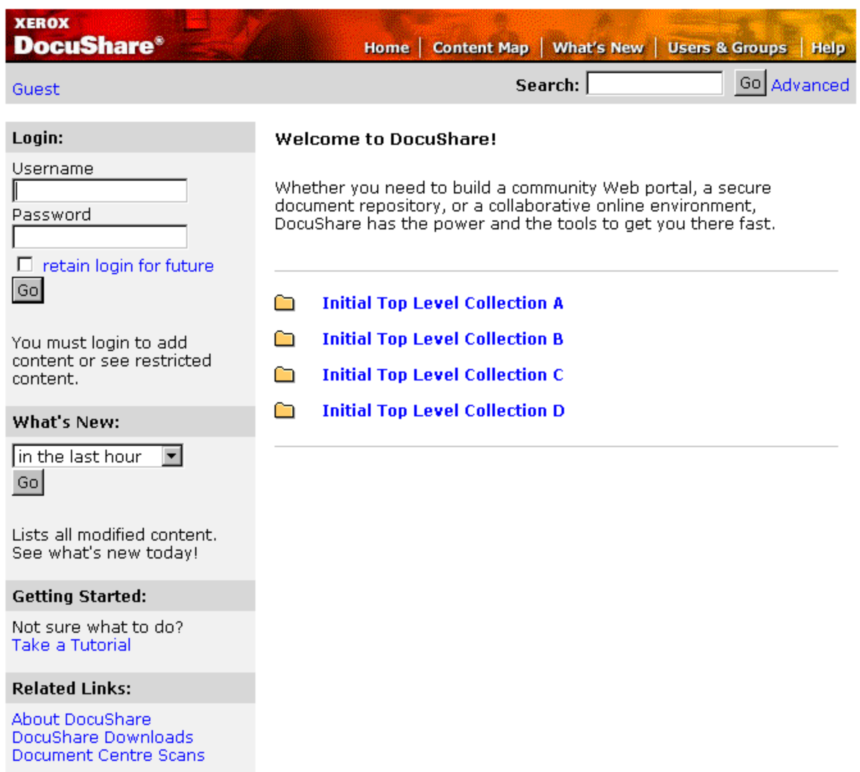
Chapter 5, Access permissions, explains how to assign permissions to DocuShare objects.

Accessing DocuShare

You access DocuShare through a Web browser, such as Microsoft Internet Explorer or Netscape Navigator. When you connect to your DocuShare site, the DocuShare home page is the first page you see. From the home page you can access the content on your site and use the navigational links to get to DocuShare features.

When you first access DocuShare, you are a guest. To add content to the site, you must have a user account and be logged in. See Chapter 2, Users and groups, for more information.

Although your administrator can customize your site home page and different browsers may not display site elements the same, your home page should look similar to the example shown below.



What's on the home page

The DocuShare home page includes these features:

- The site's top-level collections, which contain all the content on your site
- Login area
- What's New menu, which you can use to see the content that has been added or changed
- Help on getting started using DocuShare
- Links to related information
- Navigation links to other DocuShare pages: Home, Content Map, What's New, Users & Groups, Help
- Search area used to find objects in a collection or on the site

Using WebDAV folders

DocuShare supports the WebDAV (Web Distributed Authoring and Versioning) protocol, which enables you to access DocuShare content through a WebDAV-compliant folder. You do not need client software installed on your computer. If you are a Windows 2000 or XP user, simply go to **My Network Places** to add a DocuShare server as a network place. If you are using a Macintosh with OS X, select **Connect to Server** to add the URL for a DocuShare server.

NOTE: In both Windows and OS X, you must append the DocuShare server's URL with **/webdav**. When you are prompted to log in, use your DocuShare username and password.

Navigating your site

The navigation bar at the top of your home page provides links to other DocuShare pages. These links also appear at the top of every page.

- Home—returns to the home page.
- Content Map—displays the collections on your site, based on your current location.
- What's New—lists the new and changed objects on your site.
- Users & Groups—provides links to listing accounts, creating accounts, and searching for users and groups.
- Help—provides access to user guides, training exercises, and software downloads.
- Username—displays your user account properties. Your username displays after you log into DocuShare.
- Logout—logs you out of DocuShare. The link displays after you log in.
- My Tasks—shows the routing tasks assigned to you and the tasks you assigned. The link displays after you log in.
- Advanced—provides advanced search features.

In addition, most DocuShare pages include bread crumbs, which provide a path from the home page to your current location. You can click any link in the bread crumbs to go to the page. Bread crumbs for an open collection are shown below.

Location: Home > Initial Top Level Collection D > My Collection Listing

For objects that appear in more than one location, multiple bread crumbs are provided.

Seeing what’s new on your site

From any page, you can display a list of the content that has been added or changed on your site. This lets you quickly find any object or content that might be of interest to you.

To find out what’s new:

1. Do one of the following:
   - From the home page, select the time period you want under **What’s New**. Click **Go**.
   - On the navigation bar, click **What’s New**.

   DocuShare displays the list of content that has been added or changed.
2. To change the search query used to display the list of new or changed content, click **Refine Query** and do the following:
   - From the **Refine Query** field, change the time period during which DocuShare searches for new or changed content.
   - From the **Sort Results** field, change how the displayed content is listed.
   - Click **Go**.

NOTE: If you are a guest user and you click **What’s New** on the navigation bar, DocuShare lists the content that has been added or changed during the past 24 hours. If you are a logged-in user and you click **What’s New** on the navigation bar, DocuShare lists the content that has been added or changed since you last clicked **What’s New**.

Logging in and out

When you are not logged into DocuShare, you have guest access to the objects on your site. As a guest, you can browse and view content, unless access to it is restricted. Logging in enables you to add objects to your site and edit content.

To log into DocuShare:

1. Go to the DocuShare home page.
2. In the Login area, enter your registered username and password in the fields.

   Your password is case-sensitive.
3. If the **Domain** field appears, select your domain name.

NOTE: The **Domain** field appears if your site uses the LDAP (Lightweight Directory Access Protocol) add-on.

4. If the **retain login for future** checkbox appears, click it if you want to remain logged into DocuShare after you close and reopen your browser.

NOTE: The **retain login for future** checkbox appears if your administrator configured your site to use a feature called Persistent Login. For DocuShare to save your password, Internet Explorer's **Do not save encrypted pages to disk** option cannot be enabled. You can check the option's setting by selecting **Internet Options** from the **Tools** menu and then clicking the **Advanced** tab.

5. Click **Go**.

   Your username appears on the navigation bar, indicating that you are logged in.

To log out of DocuShare:

1. Do one of the following:
   - If Persistent Login is not enabled or you did not select the **retain login for future** checkbox, close the browser window.
   - If you selected the **retain login for future** checkbox, click the **Logout** link on the navigation bar.

DocuShare applications

DocuShare provides several applications to extend its functionality.

DocuShare Windows Client—A Windows-based application that seamlessly integrates DocuShare's document management features within your Windows desktop environment. From your Windows desktop you can easily access DocuShare content, drag and drop files between DocuShare collections and your local and network drives, and open, edit, and save DocuShare files from a variety of applications.

This application is included with DocuShare. To download it, go the Help page and click the **Downloads** tab.

DocuShare Outlook Client—A Windows-based application that enables you to conveniently manage and share information within Microsoft Outlook. Mapped DocuShare servers and collections appear as mail folders in your Inbox. Open a folder to browse the contents of a collection, open files for editing, and save new versions of files. You can easily archive and share mail messages and attachments by dragging and dropping them to a collection. When you need to find information quickly, you can perform keyword searches.

This application must be purchased separately.

DocuShare Interact—An easy-to-use editor that enables any number of users to collaborate on a project using the web. An Interact page author creates an Interact page for a specific task or project. Using a web browser, you and other users can add, revise, and share page content. Interact pages can be used for any task that requires or would benefit from a collaborative effort, such as managing project tasks, co-authoring a document, and assigning and tracking action items.

This application must be purchased separately.

2

Users and groups

About DocuShare accounts

By default, DocuShare is a community-maintained site, allowing anyone to create user and group accounts. Depending on the needs of your site, the DocuShare administrator can restrict account creation to logged-in users or to an administrator.

Additionally, if your site uses the LDAP (Lightweight Directory Access Protocol) add-on to manage user accounts, an administrator creates an account for you. To find out how your site is configured, see your DocuShare administrator.

DocuShare user accounts

When you first access DocuShare or until you log in, you are considered a guest user. As a guest, you can browse any unrestricted, or public, content. To add objects and edit content, you must have a DocuShare user account.

Creating a user account

If your site allows guest users to create accounts, you can create a user account. If account creation is restricted, an administrator will need to create a user account for you.

To create a user account:

1. On the navigation bar, click the **Users & Groups** link.
2. Click the **Add User** tab.
3. On the Add User page, enter the following information:

   Username—The name you want to use to log into DocuShare. When creating objects, the username is specified as the object's owner.

   Password—The password you want to use to log into DocuShare. Your password is case-sensitive and must be typed as specified when logging in.

   Password Confirm—The same password that you typed in the Password field.

   Domain—An organization or other entity on your DocuShare site. This field appears if your site uses the LDAP add-on. The menu lists internal domains only.

   Last Name—Your last name. Users are listed on the DocuShare site by their first and last names.

4. Enter any optional information. See Table 2–1 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties. .

Table 2–1: Add User properties

Property	Description
First Name	Your first name. Users are listed on the DocuShare site by their first and last names.
Email Address	Your complete email address. For example: docushareuser@mycompany.com. User email addresses are available to all DocuShare users, allowing a user to easily contact another user.

5. Click **Apply**.

   The Properties page for the user account appears.

If DocuShare was unable to create a new account, a message page appears describing the problem.

Viewing user account properties

You can view the properties of any DocuShare user account. To view the properties, you do not need to be logged into DocuShare.

To view a user's account properties:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select **Users**.
4. Do one of the following:
    - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
    - To display all user accounts, click **Show All**.
5. From the displayed list, click the name of the user whose properties you want to view.

    The Properties page appears, displaying the user's properties. See Table 2–2 for a description of each property.

Table 2–2: User properties

Property	Description
Username	The name used to log into DocuShare.
Domain	The organization or entity to which the user is assigned. This field appears if your site uses the LDAP add-on.
Last Name	The user's last name. Users are listed on the DocuShare site by their first and last names.
First Name	The user's first name. Users are listed on the DocuShare site by their first and last names.
Handle	The object's unique identifier.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Email Address	The user's complete email address. For example: docushareuser@mycompany.com. User email addresses are available to all DocuShare users, allowing a user to easily contact another user.
Email Format	The email format DocuShare uses to send mail messages to the user: **HTML** or **Plain Text**.

Table 2–2: User properties

Property	Description
Last Login	The date and time when the user last logged into DocuShare.
Phone	The user’s phone number.
Home Page	The URL of the user’s home page, if one is available.
Mail Stop	The user’s mailing address or mail stop.
Routing Task Notification	The method used to notify the user of assigned routing tasks. **Email** sends a mail message with a URL to the task. **None** displays the task in the My Tasks window only.
Member Of	The DocuShare groups of which the user is a member.
Subscribed To	The subscriptions the user added for objects.

Changing your user account properties

You must be logged in as the user whose properties you want to change. You can view, but not change, another user’s properties.

To change your user account properties:

1. On the navigation bar, click your username.

   The Properties page appears.
2. Click the **Properties** tab.
3. Change the properties you want. See Table 2–2 for a description of each property.
4. Click **Apply**.

   The Properties page appears displaying your new properties.

Changing your password

You must be logged in as the user whose password you want to change. You cannot change another user’s password.

NOTE: If your site uses the LDAP add-on, you cannot change your password. Your administrator must change your password on the LDAP server.

To change your current password:

1. On the navigation bar, click your username.

   The Properties page appears.
2. Click the **Change Password** tab.

3. Enter your current password in the **Old Password** field.
4. Enter your new password in the **New Password** field.
5. Enter your new password in the **New Password Confirm** field.
6. Click **Apply**.

Changing your username

You must be logged in as the user whose username you want to change. You cannot change another user's username.

NOTE: If your site uses the LDAP add-on, you cannot change your username. Your administrator must change your username on the LDAP server.

To change your username:

1. On the navigation bar, click your username.

   The Properties page appears.
2. Click the **Change Username** tab.
3. Enter your current password in the **Password** field.
4. Enter a new username in the **Username** field.
5. Click **Apply**.

   The Properties page appears displaying your new username. The new name also appears on the navigation bar.

Changing your domain

If your site uses the LDAP add-on, you can change your domain to an internal domain on the DocuShare server. You must be logged in as the user whose domain you want to change; you cannot change another user's domain.

To change your current domain:

1. On the navigation bar, click your username.

   The Properties page appears.
2. Click the **Change Domain** tab.
3. Select a new domain from the **Domain** field.
4. Click **Apply**.

Deleting a user account

Only an administrator can delete an existing user account. Contact your administrator if you want to delete your user account. If you have several user accounts, your administrator can combine any number of the accounts into one account.

DocuShare group accounts

A group consists of any number of DocuShare users, groups, or both. When your site includes groups, you can more easily manage access to collections and objects by assigning permissions to the group instead of to each user.

Creating a group

The DocuShare administrator can choose to allow logged-in users to create group accounts or to have group account creation under administrative control. If after logging into DocuShare, you do not see the Add Group tab on the Users and Groups Registry page, then an administrator will need to create a group for you.

To create a group:

1. On the navigation bar, click **Users & Groups**.
2. Click the **Add Group** tab.
3. In the **Title** field, enter a name for the group. The name can contain spaces and punctuation marks, and can be identical to another group name.
4. In the **Domain** field, select a domain name. This field appears if your site uses the LDAP add-on. However, the menu lists internal domains only.
5. Enter any optional information. See Table 2–3 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

Table 2–3: Add Group properties

Property	Description
Description	A detailed description of the object. You can include HTML tags in the object’s description. For container objects, the description appears below the title.
Summary	A short description of the object. The summary appears below the object's title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Change Membership	Specifies who can add or remove group members and change the group’s properties. **Owner** allows only the user who created the group to make changes. **Members** allows any member of the group to make changes.
Add Me to Group	Includes you as a member of the group. Otherwise, you are the group’s owner only.

6. Click **Apply**.

   The Properties page appears, displaying information about the new group.

7. Click the **Members** tab.

   The **Members** page shows your name. By default, you are a member of the group. You can remove yourself from the group.

8. To add group members, click the **Change Membership** button.

9. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.

10. Do one of the following:

    - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
    - To display all accounts, click **Show All**.

11. In the **Possible Users/Groups** field, select the accounts to add to the group and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).

12. In the **Selected Users/Groups** field, select any accounts that you want to remove from the group and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).

13. Click the **Update** button.

    The group members display on the **Members** page.

Viewing a group's properties

You can view the properties of any DocuShare group. To view the properties, you do not need to be logged into DocuShare.

To view a group's properties:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select **Groups**.
4. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
5. From the displayed list, click the name of the group whose properties you want to view.

The Properties page for the group appears. See Table 2–4 for a description of each property.

Table 2–4: Group properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object’s description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Handle	The object’s unique identifier.
Owner	The name of the user who is the object’s current owner and has Manager access to it. By default, the owner is the user who added the object to DocuShare.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Domain	The organization or entity to which the group belongs. This field appears if your site uses the LDAP add-on.
Change Membership	Specifies who can add or remove group members and change the group’s properties. **Owner** allows only the user who created the group to make changes. **Members** allows any member of the group to make changes.

Changing a group's properties

Depending on the **Change Membership** setting, either the logged-in owner of the group or a logged-in group member can change the properties of a group.

To change a group's properties:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select **Groups**.
4. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
5. From the displayed list, click the group whose properties you want to change.

   The Properties page for that group appears.
6. Click the **Properties** tab.
7. Change the properties that you want. See Table 2–4 for a description of each property.
8. Click the **Apply** button.

Changing a group's members

Depending on the **Change Membership** setting, either the logged-in owner of the group or a logged-in group member can add and remove members from the group.

To change a group's members:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select **Groups**.
4. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
5. From the displayed list, click the group whose members you want to change.

   The Properties page for that group appears.
6. Click the **Members** tab.

   The **Members** page shows the current group members.
7. To change group members, click the **Change Membership** button.
8. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.

9. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
10. In the **Possible Users/Groups** field, select the accounts to add to the group and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
11. In the **Selected Users/Groups** field, select any accounts that you want to remove from the group and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
12. Click the **Update** button.

    The group members display on the **Members** page.

Changing the owner of a group

Only the logged-in owner of the group can change its owner. After changing the group's owner to another user, you will no longer be able to change the group's members and properties, unless **Change Membership** is set to **Members**.

To change the owner of an existing group:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select **Groups**.
4. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
5. From the displayed list, click the group whose owner you want to change.

   The Properties page for that group appears.
6. Click the **Properties** tab.
7. Click the **Change Owner** button.

   The Change Owner page appears.
8. Do one of the following:
   - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
   - To display all user accounts, click **Show All**.
9. Select a name from the **New Owner** field.
10. In the **Add Owner to Group** field, click **Yes** to add the new owner to the group.
11. Click **Update Owner**.

    The Properties page appears.

Changing a group’s domain

If your site uses the LDAP add-on, you can change a group’s domain to an internal domain on the DocuShare server. You must be the logged-in owner of the group to change its domain.

NOTE: Changing the group’s domain does not change a group member’s domain, if one is used.

To change a group’s domain:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select **Groups**.
4. Do one of the following:
   - To find a specific group account, enter any part of the group’s title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
5. From the displayed list, click the group whose domain you want to change.

   The Properties page for that group appears.
6. Click the **Change Domain** tab.
7. Select a new domain from the **Domain** field.
8. Click **Apply**.

Sending mail to group members

To easily communicate with a DocuShare group, you can send an email message to the group's members. The message is sent to each member whose user properties include an email address. To send email, your Web browser must be correctly configured with a mail client, such as Microsoft Outlook or Netscape Communicator.

To send email to the members of a group:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select **Groups**.
4. Do one of the following:
   - To find a specific group account, enter part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
5. From the displayed list, click the group that you want to send an email message to.

   The Properties page for that group appears.
6. Click the **Mail To** tab.
7. To write your message, click the **here** link.

   Your browser launches an untitled message window with each group member's email address entered in the **To** field.
8. Compose your message and click **Send** to email the message to the members of the group.

Deleting a group

You can delete a group if you are the logged-in owner of the group.

To delete a group:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select **Groups**.
4. Do one of the following:
   - To find a specific group account, enter any part of the group's title in the **Search** field. Click the **Go** button.
   - To display all group accounts, click **Show All**.
5. From the displayed list, click the group that you want to delete.

   The Properties page for that group appears.
6. At the bottom of the page, click the **Delete** button.

   The Confirm Delete page appears.

7. Click **Delete** to remove the group from your site.

   If you do not want to delete the group, click **Cancel**.

Finding and listing DocuShare accounts

From the List page, you can quickly search the users and groups registry to determine whether or not a user or group has an account on the DocuShare site. You also can list all of the user and group accounts registered on the site.

To search for a user or group:

1. On the navigation bar, click **Users & Groups**.
2. Click the **List** tab.
3. In the **Show** field, select the type of account you want to find.
4. In the **Search** field, enter a complete name or part of a name.
5. Click **Go**.

   The search results display, listing the users, groups, or both who match the search text.

To list the accounts on your site:

1. On the **List** page, select the type of account you want to list in the **Show** field.
2. Click **Show All**.

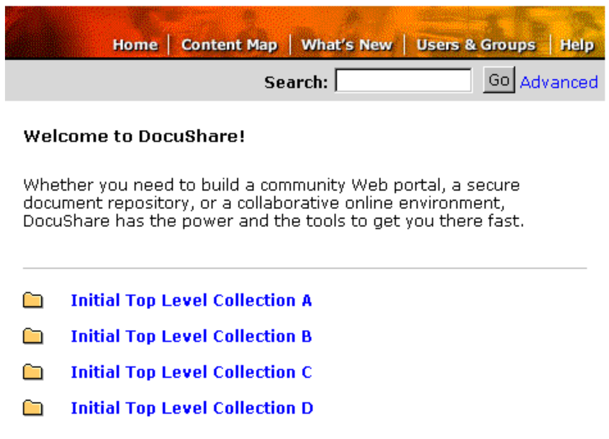
   The list of all registered accounts displays.

3

DocuShare collections

About collections

Your DocuShare site consists of any number of repositories, called collections, in which you store documents and other objects. The administrator determines which initial set of collections appears on the DocuShare home page. As a registered user, you can add collections to your DocuShare site.



Adding a collection

You can add a collection to another collection if you are logged in and have Writer access to the existing collection.

To add a collection:

1. Navigate to and open the collection to which you want to add a collection.

   The collection page opens showing all of the objects in the collection.
2. From the **Add** menu, select **Collection**.

   The Add Collection page appears.
3. In the **Title** field, enter a name for the collection. The name should be short, but descriptive, and can contain spaces and punctuation marks.
4. Enter any optional information. See Table 3–1 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

Table 3–1: Add Collection properties

Property	Description
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object’s description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
View Format	The format in which objects are displayed in the collection. **Detailed Listing** displays objects in a list. **Images** displays image files as thumbnails and all other object types as large icons.
Sort Order	The order in which objects are displayed in the collection: **Type and Title** groups objects by type and orders objects alphabetically by title. **Type and Date** groups objects by type and orders objects chronologically, with most recently modified objects displayed first. **Date** displays objects chronologically, with most recently modified objects displayed first. **Title** displays objects alphabetically by title. **Title Reversed** displays objects in reverse alphabetical order by title.

Table 3–1: Add Collection properties

Property	Description
Route Before Publishing	Requires each document to be routed before it is added to the collection.
Initial Permissions	The access permissions assigned to the new object: **Same as container** assigns the container's access permissions to the object. **Same as container except write restricted to owner** assigns the users who have Reader access to the container with Reader access to the object. You are the only user with Writer access to the object. **Restricted to owner** assigns full access permissions only to you, the object's owner.

5. Click **Apply**.

   The Properties page for the collection appears, displaying information about the new collection.

6. You can click the collection name displayed in the **Location** bread crumbs to open the collection.

To change the collection's access permissions, see Chapter 5, Access permissions.

Viewing a collection's properties

You do not need to be logged into DocuShare to view a collection's properties. However, only the owner of a collection or a user with Writer access to the collection can change the collection's properties.

To view a collection's properties:

1. Locate the collection whose properties you want to view.
2. Do one of the following:
   - If the collection is open, click the **Properties** icon that appears to the right of the collection's title.
   - If the collection is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the collection's title.

   The Properties page for the collection appears. Table 3–2 describes each property.

Table 3–2: Collection properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Handle	The object's unique identifier.
Owner	The name of the user who is the object's current owner and has Manager access to it. By default, the owner is the user who added the object to DocuShare.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.

Table 3–2: Collection properties

Property	Description
Sort Order	The order in which objects are displayed in the collection: **Type and Title** groups objects by type and orders objects alphabetically by title. **Type and Date** groups objects by type and orders objects chronologically, with most recently modified objects displayed first. **Date** displays objects chronologically, with most recently modified objects displayed first. **Title** displays objects alphabetically by title. **Title Reversed** displays objects in reverse alphabetical order by title.
View Format	The format in which objects are displayed in the collection. **Detailed Listing** displays objects in a list. **Images** displays image files as thumbnails and all other object types as large icons.
Logo	The URL or handle of a GIF or JPEG image. The URL is any valid Internet address for an image file (for example, http://www.mycompany.com/images/image.gif) and the handle is the handle number of an image in a DocuShare repository (for example, Document-12). The image displays at the top of the collection's page.
Background Image	The URL or handle of a GIF or JPEG image. The URL is any valid Internet address for an image file (for example, http://www.mycompany.com/images/image.gif) and the handle is the handle number of an image in a DocuShare repository (for example, Document-12). The image displays in the background of the collection's page.
Route Before Publishing	Requires each document to be routed before it is added to the collection.
Appears In	The collection(s) in which the object appears.

Changing a collection’s properties

You can change a collection’s properties, such as its title and sort order, if you are the logged-in owner of the collection or a logged-in user with Writer access to the collection.

To change a collection’s properties:

1. Locate the collection whose properties you want to change.
2. Do one of the following:
   - If the collection is open, click the **Properties** icon that appears to the right of the collection’s title.
   - If the collection is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the collection’s title.

   The Properties page for the collection appears.
3. Click the **Properties** tab.
4. Change the properties you want.

   See Table 3–2 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply** to save the changes.

Changing a collection's location

You can move a collection to another location or have the collection appear in several locations on your site. Although a collection can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a collection's location, you must be logged in and have Writer access to both the current and new collection.

To change a collection's location:

1. Open the collection that contains the collection whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears next to the collection's title. From the **Edit Selected** menu, select **Change Location**.
   - Click the **Properties** icon that appears to the right of the collection's title. On the Properties page for the collection, click the **Locations** tab.

   A page appears, showing the collection's current location(s).
3. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
4. In the **Possible Locations** field, select the collection(s) in which you want the collection to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Selected Locations** field, select any collections in which you do not want the collection to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the collection will become orphaned, which means it will not appear in any collection.

6. Click **Update Locations**.

   The Properties page for the collection appears displaying the collection title(s) in which the collection now appears.

Deleting a collection

You can delete a collection on your DocuShare site if you are the logged-in owner of the collection or have Manager access to it. If the collection contains other objects, you can choose to delete the collection only or the collection and its contents. To delete the collection and its contents, you must be the owner of the objects in the collection or have Manager access permission to them.

NOTE: If you delete a collection, but not its contents, and the objects are not located in another collection, they become orphaned. You are unable to access orphaned objects from a collection. Your administrator can relocate orphaned objects in a collection so you can access them again.

To delete a collection:

1. Navigate to the collection that you want to delete.
2. Do one of the following:
    - Click the checkbox that appears next to the collection’s title. From the **Edit Selected** menu, select **Delete**.
    - Click the **Properties** icon that appears to the right of the collection’s title. On the Properties page for the collection, click the **Delete** button.

    The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the collection, then you do not have Manager access to the object and cannot delete it.

3. From the **For collections, delete** menu, do one of the following:
    - Select **Collection and Contents** to delete the collection and all of the objects in it.
    - Select **Collection Only** to delete the collection, but not its contents.
4. Click **Delete** to remove the collection from your site.

    If you do not want to delete the collection, click **Cancel**.

Restoring a deleted collection

If you accidentally delete a collection, your administrator can restore it if the Trashcan is enabled on your site. The Trashcan holds deleted objects until your administrator expunges or restores the Trashcan contents. See your administrator to restore a deleted collection.

Editing multiple objects in a collection

When viewing the objects in a collection, you can use the Edit Selected menu to change the location, owner, and name of one or more objects, and delete several objects.

To edit multiple collection objects:

1. Navigate to and open the collection.
2. Do one of the following:
   - To edit some of the objects, click the checkbox next to the objects you want.
   - To edit all of the objects, click the **Select All** button.
3. From the **Edit Selected** menu, select one of the following choices:
   - **Change Location**—Move the object to another location.
   - **Change Owner**—Change the object's owner.
   - **Delete**—Remove the object from your site.
   - **Rename**—Change the object's title.

   A confirm window appears.
4. Make the change you want.

NOTE: When using the **Change Location** command, if an object appears in more than one collection, only the current collection is listed in the **Selected Locations** field.

4

DocuShare documents

About documents

Using DocuShare, you can store, access, and manage documents created in a variety of popular formats. You add documents to DocuShare by uploading them from your computer or a network drive to a collection on your site. With the documents stored in a DocuShare collection, users connected to the network can use their browser to search for, view, edit, and download a document.

DocuShare provides a repository for your documents; your browser controls how a document is displayed. By design, browsers are able to handle several types of documents and files, such as HTML, GIF, and JPEG. However, for some documents, such as Microsoft Word and Excel, your browser launches a **helper application** to run or display the document either outside or within the browser window. To play multimedia files, the browser uses a **plug-in**, which opens the file within the browser window.

Your browser is preconfigured to use specific helper applications and plug-ins. Generally, if you try to open a document or file that your browser does not recognize, it displays a window that guides you in finding the application to use for that type of file.

Adding a document to a collection

You add a document to a collection by uploading it from a folder on your local drive or a network drive. The upload copies the document to the collection. Once a document is in a collection, it is available to others for viewing or collaborative work.

To add a document, you must be logged in and have Writer access to the collection.

To add a document to a collection:

1. Navigate to and open the collection to which you want to add the document.
2. From the **Add** menu, select **Document**.

   The Add Document page appears.
3. Enter the following information:

   Filename—The complete path and filename of the document you want to upload. You can click the Browse button to navigate to and select the document.

   If you enter the path and filename of a document that does not appear on the drive, DocuShare uploads an empty document.

   Title—The title of the document. The title should be short, but descriptive, and can contain spaces and punctuation marks.

   Max Versions—The maximum number of versions to save. When a new version of a document is saved to DocuShare, the oldest version is deleted.
4. Enter any optional information. See Table 4–1 for a description of each property.

Table 4–1: Add Document properties

Property	Description
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.
Author	The document's author or authors. An author can be someone other than the document's owner.

Table 4–1: Add Document properties

Property	Description
Initial Permissions	The access permissions assigned to the new object: **Same as container** assigns the container's access permissions to the object. **Same as container except write restricted to owner** assigns the users who have Reader access to the container with Reader access to the object. You are the only user with Writer access to the object. **Restricted to owner** assigns full access permissions only to you, the object's owner.
Document Routing	Specifies whether or not to route the document when adding it to the collection: **Do not route the document** adds the document to the collection without routing it. **Route the document and publish it later** displays a Routing Slip so you can route the document to other users before adding it to the collection. **Publish and then route the document** adds the document to collection and then displays a Routing Slip so you can route the document to other users.

5. Click **Apply** to upload the document to the collection.

   The Properties page for the document appears, displaying information about the new document. If you chose to route the document, a Routing Slip appears. For information on how to use the Routing Slip, see Chapter 11, Routing documents.

NOTE: DocuShare identifies each object on the site with a unique handle (for example, Document-37). Therefore, you can upload a document that has a name identical to a document stored in a collection.

Viewing a document's properties

Any user can view the properties of a document.

To view a document's properties:

1. Open the collection that contains the document whose properties you want to view.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears, displaying the current properties. Table 4–2 describes each property.

Table 4–2: Document properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Handle	The object's unique identifier.
Owner	The name of the user who is the object's current owner and has Manager access to it. By default, the owner is the user who added the object to DocuShare.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.
Locked By	The name of the user who has the document locked.
Author	The document's author or authors. An author can be someone other than the document's owner.
Max Versions	The maximum number of versions to save. When a new version of a document is saved to DocuShare, the oldest version is deleted.
Filename	The original filename.

Table 4–2: Document properties

Property	Description
Content Type	The format of the document, as defined by its MIME Type. For example, a Microsoft Word document would map to the MIME Type application/msword. DocuShare uses the MIME Type to open a document in the appropriate editor. When a document is uploaded to the server, DocuShare tries to determine the content type. If the type cannot be determined, you can enter the appropriate MIME Type for the document. If you are uncertain about the correct value to enter, see your administrator.
Size	The size of the document in bytes.
Abstract	For non-image documents, a summary of the document's contents. The abstract appears immediately after the document is indexed.
Appears In	The collection(s) in which the object appears.

Changing a document’s properties

You can change a document’s properties if you are the logged-in owner of the document or a logged-in user with Writer access to the document.

To change a document’s properties:

1. Open the collection that contains the document whose properties you want to change.
2. Click the **Properties** icon that appears to the right of the document’s title.

   The Properties page for the document appears, displaying the current properties.
3. Click the **Properties** tab.
4. Change the properties you want.

   See Table 4–2 for a description of the properties.
5. Click **Apply** to save the changes.

Changing a document's location

You can move a document to another collection or have the document appear in several collections on your site. Moving a document eliminates the need to delete the document and then upload it again. Although a document can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a document's location, you must be logged in and have Writer access to the document.

To change a document's location:

1. Navigate to and open the collection that contains the document that you want to move.
2. Do one of the following:
   - Click the checkbox that appears next to the document's title. From the **Edit Selected** menu, select **Change Location**.
   - Click the **Properties** icon that appears to the right of the document's title. On the Properties page for the document, click the **Locations** tab.

   A page appears, showing the document's current location(s).
3. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
4. In the **Possible Locations** field, select the collection(s) in which you want the document to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Selected Locations** field, select any collections in which you do not want the document to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the document will become orphaned, which means it will not appear in any collection.

6. Click **Update Locations**.

   The Locations page appears displaying the collection title(s) in which the document now appears.

Viewing a document

You can view the contents of any document to which you have Reader access.

To view the contents of a document:

1. Navigate to and open the collection that contains the document you want to view.
2. Click the document title.

NOTE: If there is a **View** icon to the right of the document's title, you can click it to display the document in HTML format. For more information, see Viewing a document in HTML format on page 4–16.

3. To return to the collection page, do one of the following:
   - If the document opened in a separate window, select **Exit** from the **File** menu.
   - If the document opened within the browser window, click the browser's **Back** button.

NOTE: If you click the X in the top-right corner of the browser or select **Close** from the **File** menu, your browser closes and you lose your connection to the DocuShare site.

Editing a document

DocuShare supports the complete development cycle of a document, allowing users to collaborate on a project. Document check-out and check-in ensures that only one user at a time edits a document. Version control maintains a user-specified number of document versions; each version includes a version number, an author, and any revision comments.

To edit a document and create a new version, you must be either the logged-in owner of the document or a logged-in user with Writer access to it.

To edit a document:

1. Navigate to and open the collection that contains the document that you want to edit.
2. Click the **Check Out** icon that appears to the right of the document's title.

   The document opens in the browser window, or a window appears allowing you to open or download the document. When the document is checked out, it is locked, which prevents other users from editing it.
3. Edit the document.
4. Do one of the following:
   - If the document opened in the browser, click the **Back** button. Click **Yes** to save your edits.
   - If the document opened in its native editor, select **Save As** from the **File** menu.
5. In the **Save As** window, save the document to a location on your local drive.

   Do not change the name of the document.
6. On the collection page, click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
7. At the bottom of the page, click the **New Version** button.
8. On the Add Version page, click the **Browse** button.
9. Navigate to the location on your local drive in which you saved the edited document, select it, and click **Open**.

   The path to the document appears in the **Filename** field.
10. Optionally, enter any comments in the **Version Comments** field.
11. For **Unlock Document**, click **No** if you do not want to unlock the document after adding the new version.
12. Click **Apply**.

Adding a new version of a document

You can add a new version of a document by uploading a document from a folder on your local drive or a network drive. To add a new version, you must either be the logged-in owner of the document or have Writer access to it.

To add a new version of a document:

1. Navigate to and open the collection that contains the document that you want to update with a new version.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
3. At the bottom of the page, click the **New Version** button.
4. On the Add Version page, click the **Browse** button.
5. Navigate to the location on your local drive that contains the document you want to add as a new version, select it, and click **Open**.

   The path to the document appears in the **Filename** field.
6. Optionally, enter any comments in the **Version Comments** field.
7. If the previous version of the document was locked, the **Unlock Document** field appears. Click **No** if you do not want to unlock the document after adding the new version.
8. Click **Apply**.

Locking a document

If you are the logged-in owner of the document or a logged-in user with Writer access to the document, you can lock it to keep other users from editing the document.

To lock a document:

1. Navigate to and open the collection that contains the document that you want to lock.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
3. At the bottom of the page, click the **Lock** button.

   On the View page, the **Locked By** property displays your name as the user who locked the document.
4. Return to the collection that contains the document by clicking the collection title displayed after **Appears In.** The **Locked** icon appears to the right of the document title.

   Users can view the document, but they cannot check out the document for editing.

Unlocking a document

If you do not want to add a new version of a document to a collection, you can unlock a locked document. To unlock a document and allow users to edit the document, you must be the logged-in owner of the document or a logged-in user with Writer access to it. A document is locked if a padlock icon appears to the right of the document's title.

To unlock a locked document:

1. Navigate to and open the collection that contains the document that you want to unlock.
2. Click the **Properties** icon that appears to the right of the document's title.

   The Properties page for the document appears.
3. At the bottom of the page, click the **Unlock** button.

   On the View page, the **Locked By** property does not display a username.
4. Return to the collection that contains the document by clicking the collection title displayed after **Appears In**. The **Check Out** icon appears to the right of the document's title.

   Users can now check out the document for editing.

Viewing a document’s version history

DocuShare’s version control feature enables you to maintain a record of a document's history. For each version DocuShare keeps, you can view the version number, the date and time the document was added to the collection, the user who added the document, and any user-provided comment.

By default, DocuShare saves four versions of a document. You can change the default setting by changing the document's **Max Versions** property. See Changing a document’s properties on page 4–7.

To view a document’s version history:

1. Navigate to and open the collection that contains the document whose version history you want to view.
2. Click the **Properties** icon that appears to the right of the document’s title.

   The Properties page for the document appears.
3. Click the **History** tab.

   The page displays all versions of the document.
4. To view a specific version of the document, click the number in the **Version #** column.
5. To return to the History page, do one of the following:
   - If the document opened in a separate window, select **Exit** from the **File** menu.
   - If the document opened within the browser window, click the browser’s **Back** button.

Downloading a document

You can download a document from a DocuShare collection to your computer. The download copies the document and keeps the original document in the collection.

To download a document:

1. Navigate to and open the collection that contains the document that you want to download.
2. Click the document that you want to download.

   The document opens.
3. From the **File** menu, select **Save As**.
4. Select a location on your computer where you want to save the document.
5. Click **Save**.

   A copy of the document downloads to your computer.
6. To return to the collection page, do one of the following:
   - If the document opened in a separate window, select **Exit** from the **File** menu.
   - If the document opened within the browser window, click the browser's **Back** button.

Viewing a document in HTML format

DocuShare provides an HTML conversion feature that lets you view supported document types in HTML format. This feature eliminates the need to configure your browser to display certain document types. If a **View** icon appears to the right of a document's title, then you can view the document in HTML.

NOTE: The HTML conversion feature cannot convert documents that contain encrypted information.

To view a document in HTML format:

1. Open the collection that contains the document you want to view.
2. Click the **View** icon that appears to the right of the document's title.

   DocuShare converts the document to HTML and displays the document.
3. Click the browser's **Back** button to return to the collection page.

Deleting a document

You can delete a document from a collection if you are the logged-in owner of the document or a logged-in user with Manager access to it.

To delete a document:

1. Open the collection that contains the document that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the document's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the document's title. On the Properties page for the document, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the document, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the document from your site.

   If you do not want to delete the document, click **Cancel**.

Restoring a deleted document

If you accidentally delete a document, your administrator can restore it if the Trashcan is enabled on your site. The Trashcan holds deleted objects until your administrator expunges or restores the Trashcan contents. See your administrator to restore a deleted document.

5

Access permissions

About access permissions

Every DocuShare object has a set of associated permissions called its **access list**. Permissions are the access rights that a defined set of users and groups has to view, delete, or change a DocuShare object. The object's owner or any user with Manager access to the object can assign and change the permissions.

As the owner of the DocuShare objects that you add to your site, you can control the type of access users and groups have to those objects. When you add an object to a collection, you set the object’s initial permissions. At any time you can change the users and groups who have access to the object and the type of access each user or group has.

DocuShare provides the following access permissions that you can assign to users and groups:

- **Reader** allows the user or group to read the contents of the object and view its associated properties and permissions.
- **Writer** allows the user or group to edit the object’s properties and add new objects, including new versions of documents.
- **Manager** allows the user or group to delete the object, and change the object’s access permissions and owner.

In addition, you can control which users can see an object in a search results list.

Viewing an object’s permissions

As a guest user or a user with Reader access to an object, you can view the object’s permissions.

To view an object’s permissions:

1. Locate the object whose permissions you want to view.
2. Click the **Properties** icon that appears to the right of the object’s title.

   The Properties page for that object appears.
3. Click the **Permissions** tab.

   The Permissions page displays the object’s access list, which includes three DocuShare groups:

   Content Administrators—The registered users who have full access permissions to all of the objects on your DocuShare site.

   All Users and Guest—All registered DocuShare users and the guest user.

   All Users Except Guest—All registered DocuShare users.

Changing an object's permissions

You can change an object's permissions if you are the logged-in owner of the object or a logged-in user with Manager access to the object.

To change an object's permissions:

1. Locate the object whose permissions you want to change.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for that object appears.
3. Click the **Permissions** tab.

   The Permissions page for that object appears.
4. For **Search Available to**, click **Anyone** to allow all users to view the object in a search results list. Click **Access List Only** to allow only those users included in the object's access list to see the object in a search results list.
5. Check the permission boxes you want for each user and group displayed in the access list:
   - **Reader** allows the user or group to read the contents of the object and view its associated properties and permissions.
   - **Writer** allows the user or group to edit the object's properties and add new objects, including new versions of documents.
   - **Manager** allows the user or group to delete the object, and change the object's access permissions and owner.
6. To save the changes you made, click **Apply**.

Changing an object's access list

You can change the list of users and groups who have access to an object if you are the logged-in owner of the object or a logged-in user with Manager access to the object.

To change an object's access list:

1. Locate the object whose access list you want to change.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for that object appears.
3. Click the **Permissions** tab.

   The Permissions page for that object appears.
4. Click the **Change Access List** button.

   The Change Access List page appears.
5. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
6. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
7. In the **Possible Users/Groups** field, select the accounts to add to the access list and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
8. In the **Selected Users/Groups** field, select any accounts that you want to remove from the access list and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
9. Click **Update Access List**.

   The Permissions page appears, displaying the new access list.
10. In the **Access List**, check the permission boxes you want for each account you added.
11. Click **Apply**.

Changing the owner of an object

The default owner of an object is the user who initially created the object. You can change an object's owner if you are the logged-in owner of the object or a logged-in user with Manager access to the object.

To change the owner of an object:

1. Locate the object whose owner you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the object's title. From the **Edit Selected** menu, select **Change Owner**. On the confirmation page, click **Confirm**.
   - Click the **Properties** icon that appears to the right of the object's title. Click the **Permissions** tab and then click the **Change Owner** button.

   The Change Owner page appears.
3. Do one of the following:
   - To find a specific user account, enter part of the user's first name, last name, or username in the **Search** field. Click the **Go** button.
   - To display all user accounts, click **Show All**.
4. Select a name from the **New Owner** field.
5. Click **Update Owner**.

   The Permissions page for the object appears, displaying the name of the new owner at the top of the access list. The new owner has Reader, Writer, and Manager permissions.

   The name of the previous owner remains in the access list.

Applying permissions to the objects in a container

When you change the access permissions of a collection, calendar, or bulletin board that includes objects, you can choose how to apply the container's permissions to its contents. You can choose to apply all of the permissions or only the changed permissions to either the container or the container and its contents.

You can change a container's access permissions if you are the logged-in owner of the container or a logged-in user with Manager access to it.

To apply a container's access permission to the objects in it:

1. Locate the container whose permissions you want to unify.
2. Click the **Properties** icon that appears to the right of the container's title.

   The Properties page for that container appears, displaying the current properties.
3. Click the **Permissions** tab.

   The Permissions page for that container appears.
4. Make the changes you want to the access list.
5. For **Options**, select one of the following:
   - **Apply all permissions to**—Assigns all of the access permissions.
   - **Apply only changes to**—Assigns only the changed access permissions.
6. Select one of the following:
   - **This container only**—Applies the permissions to the container only. The permissions of the container's objects are not changed.
   - **This container and its objects, including same objects that appear in other containers**—Applies the permissions to the container and the objects in it. The permissions of the same objects that appear in other containers also are changed.
   - **This container and its objects, *excluding* same objects that appear in other containers**—Applies the permissions to the container and the objects in it. The permissions of the same objects that appear in other containers are **not** changed.
7. Click **Apply**.

6

DocuShare calendars

About calendars

You can add a calendar to a collection to keep track of your appointments, meetings, and other activities. If you and a group of co-workers are responsible for a project, you can share a calendar to manage the tasks and schedules.

The entries you add to a calendar are called events. An event can occur all day or during a specified time period. In addition, an event can occur once or repeatedly, such as a weekly staff meeting or a class.

You can display a calendar in either month, week, or day view.

Month view

Month view displays an entire month with the current day highlighted. From the current month, you can click a link for the previous month and the next month. You can also display calendars for previous and following years.

The start time and title of each calendar event is shown on the date to which it was added.

Week view

Week view displays an entire week with the current day highlighted. From the current week, you can click a link for the previous week and the next week. You can also display calendars for previous and following years.

The duration, title, and owner of each event is shown on the date to which it was added.

Day view

Day view displays the current day. From the current day, you can click a link for the previous day and the next day. You can also display a day from another month or year.

The day view shows the duration, title, and owner of each event added to the date.

Adding a calendar

You can add a calendar to a collection if you are logged in and have Writer access to the collection.

To add a calendar to a collection:

1. Navigate to and open the collection to which you want to add a calendar.

   The collection page opens showing all of the objects in the collection.

2. From the **Add** menu, select **Calendar**.

   The Add Calendar page appears.

3. In the **Title** field, enter a name for the calendar. The name should be short, but descriptive, and can contain spaces and punctuation marks.

4. Enter any optional information. See Table 6–1 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

Table 6–1: Add Calendar properties

Property	Description
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object’s description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Default View	Displays the calendar as a series of individual months or individual weeks each time the calendar is opened. Once open, you can change the calendar view.
Initial Permissions	The access permissions assigned to the new object: **Same as container** assigns the container’s access permissions to the object. **Same as container except write restricted to owner** assigns the users who have Reader access to the container with Reader access to the object. You are the only user with Writer access to the object. **Restricted to owner** assigns full access permissions only to you, the object’s owner.

5. Click **Apply**.

   The Properties page for the calendar appears, displaying information about the new calendar.

6. You can click the calendar name displayed in the **Location** bread crumbs to open the calendar.

To change the calendar's access permissions, see Chapter 5, Access permissions.

Changing the calendar view

When viewing a calendar, you can change among the three views.

To change the calendar view:

1. Navigate to and open the calendar.
2. From the **View** menu, select either **Month View**, **Week View**, or **Day View**.

Viewing a calendar's properties

You do not need to be logged into DocuShare to view a calendar's properties. However, only the owner of a calendar or a user with Writer access to the calendar can change the calendar's properties.

To view a calendar's properties:

1. Do one of the following:
   - If the calendar is open, click the **Properties** icon that appears to the right of the calendar's title.
   - If the calendar is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the calendar's title.

   The Properties page for the calendar appears, displaying the current properties. Table 6–2 describes each property.

Table 6–2: Calendar properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Handle	The object's unique identifier.
Owner	The name of the user who is the object's current owner and has Manager access to it. By default, the owner is the user who added the object to DocuShare.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.
Default View	Displays the calendar as a series of individual months or individual weeks each time the calendar is opened. Once open, you can change the calendar view.
Appears In	The collection(s) in which the object appears.

Changing a calendar's properties

You can change a calendar's properties if you are the logged-in owner of the calendar or a logged-in user with Writer access to the calendar.

To change a calendar's properties:

1. Do one of the following:
   - If the calendar is open, click the **Properties** icon that appears to the right of the calendar's title.
   - If the calendar is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the calendar's title.

   The Properties page for the calendar appears.
2. Click the **Properties** tab.
3. Change the properties you want.

   See Table 6–2 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

4. Click **Apply** to save the changes.

Changing a calendar’s location

You can move a calendar to another collection or have the calendar appear in several collections on your site. Although a calendar can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a calendar’s location, you must be logged in and have Writer access to it.

To change a calendar’s location:

1. Navigate to and open the collection that contains the calendar whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears next to the calendar’s title. From the **Edit Selected** menu, select **Change Location**.
   - Click the **Properties** icon that appears to the right of the calendar’s title. On the Properties page for the calendar, click the **Locations** tab.

   A page appears, showing the calendar’s current location(s).
3. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
4. In the **Possible Locations** field, select the collection(s) in which you want the calendar to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Selected Locations** field, select any collections in which you do not want the calendar to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the calendar will become orphaned, which means it will not appear in any collection.

6. Click **Update Locations**.

   The Properties page for the calendar appears displaying the collection title(s) in which the calendar now appears.

Deleting a calendar

You can delete a calendar if you are the logged-in owner of the calendar or have Manager access to it. When you delete a calendar, all of the events in it are also deleted.

To delete a calendar:

1. Navigate to and open the collection that contains the calendar you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the calendar’s title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the calendar’s title. On the Properties page for the calendar, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the calendar, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the calendar from your site.

   If you do not want to delete the calendar, click **Cancel**.

Restoring a deleted calendar

If you accidentally delete a calendar, your administrator can restore it if the Trashcan is enabled on your site. The Trashcan holds deleted objects until your administrator expunges or restores the Trashcan contents. See your administrator to restore a deleted calendar.

Adding an event to a calendar

You can add an event to a calendar to which you have Writer access. You must also be logged in to DocuShare. You can set the event so that it occurs on a regular basis, such as every Monday or every two weeks.

To add a calendar event:

1. Open the calendar to which you want to add an event.
2. From the **Add** menu, select **Event**.

   The Add Event page appears.
3. In the **Title** field, enter a name for the event.
4. Optionally, enter a description of the event in the **Description** field.
5. In the **Date** field, select the date on which the event is to occur.
6. For **Time**, do one of the following:
   - Select **No Time** if the event is to occur all day.
   - Select the beginning and ending times if the event is to occur during a specified time period. Be sure to select **am** or **pm** as appropriate.
7. If the event is to occur on a regular basis, select the **Repeat** frequency and number of occurrences.
8. For **Initial Permissions**, select one of the following:
   - **Same as container** assigns the container's access permissions to the object.
   - **Same as container except write restricted to owner** assigns the users who have Reader access to the container with Reader access to the object. You are the only user with Writer access to the object.
   - **Restricted to owner** assigns full access permissions only to you, the object's owner.
9. Click **Apply** to add the event to your calendar.

   The Properties page for the event appears, displaying information about the new event.
10. You can click the calendar name displayed in the **Location** bread crumbs to open the calendar.

    The event you added appears in the calendar.

To change the event's access permissions, see Chapter 5, Access permissions.

Changing a calendar event's properties

You can change the properties of a calendar event such as the title or time. If the event is recurring, the change is made to each event in the series. To change the properties, you must be the logged-in owner of the calendar or a logged-in user with Writer access to the calendar.

To change a calendar event's properties:

1. Navigate to and open the calendar that contains the event you want to change.
2. Click the title of the event.

   The Properties page for the event appears.
3. Click the **Properties** tab.
4. Change the properties you want.

   See Table 6–3 for a description of each property.

Table 6–3: Event properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.
Date	The month, day, and year for the event.
Time	The start and end times for the event, in quarter-hour increments. If the event is to occur all day, select **No Time**.
Repeat	For an event that occurs more than once, the frequency and number of occurrences.

5. Click **Apply** to change the event's properties.

Deleting a calendar event

You can delete a calendar event if you have Manager access to it or you are the calendar event's owner. You also must be logged into DocuShare.

To delete a calendar event:

1. Navigate to and open the calendar that contains the event you want to delete.
2. Click the title of the event.

   The Properties page for the event appears.
3. At the bottom of the page, click the **Delete** button.
4. On the Confirm Delete page, do one of the following:
   - If the event is a single occurrence, click the **Delete** button.
   - If the event occurs more than once, click the **Delete All Events in This Series** button to delete all occurrences of the event from the calendar; click the **Delete Just This Event** button to delete the event from the date you selected.

NOTE: Your administrator can restore a deleted non-recurring single event or a deleted recurring event series. However, your administrator cannot restore a single event that was deleted from a recurring event series.

Changing the location of a calendar event

You can move an event to another calendar or have it appear in several calenders. To move an event, you must be the logged-in owner of the calendar or a logged-in user with Writer access to the calendar.

Although an event can appear in several calendars, there is only one copy of it, which saves space on your DocuShare site.

To change the location of a calendar event:

1. Navigate to and open the calendar that contains the event you want to move.
2. Click the title of the event.

   The Properties page for the event appears.
3. Click the **Locations** tab.

   The Locations page appears, showing the event's current location(s).
4. Do one of the following:
   - To find specific calendars, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all calendars, click **Show All**.
5. In the **Possible Locations** field, select the calendar(s) in which you want the event to appear and click the **Add** button. To select multiple calendars, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any calendars in which you do not want the event to appear and click the **Remove** button. To select multiple calendars, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one calendar appears in the **Selected Locations** field. Otherwise, the event will become orphaned, which means it will not appear in any calendar.

7. Click **Update Locations**.

7

DocuShare bulletin boards

About bulletin boards

You can add a bulletin board to a collection to facilitate an online discussion. Users can add messages, or bulletins, to the bulletin board for other users to read.

Bulletins appear on the board in chronological order, with the latest message appearing at the top of the list. The bulletin board can be set up to have bulletins expire after a specified period of time.

Adding a bulletin board

You can add a bulletin board to a collection if you are logged in and have Writer access to the collection.

To add a bulletin board to a collection:

1. Navigate to and open the collection to which you want to add a bulletin board.

   The collection page opens showing all of the objects in the collection.

2. From the **Add** menu, select **Bulletin Board**.

   The Add Bulletin Board page appears.

3. In the **Title** field, enter a name for the bulletin board. The name should be short, but descriptive, and can contain spaces and punctuation marks.

4. In the **Bulletins Expire In** field, select the length of time to retain bulletins in the bulletin board after they are added.

   When a bulletin becomes older than the duration you select, it no longer appears in the bulletin board. You can view and delete expired bulletins on the bulletin board's View Expired page.

5. Enter any optional information. See Table 7–1 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

Table 7–1: Add Bulletin Board properties

Property	Description
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Initial Permissions	The access permissions assigned to the new object: **Same as container** assigns the container's access permissions to the object. **Same as container except write restricted to owner** assigns the users who have Reader access to the container with Reader access to the object. You are the only user with Writer access to the object. **Restricted to owner** assigns full access permissions only to you, the object's owner.

6. Click **Apply**.

   The Properties page for the bulletin board appears, displaying information about the new bulletin board.

7. You can click the bulletin board name displayed in the **Location** bread crumbs to open the bulletin board.

To change the bulletin board's access permissions, see Chapter 5, Access permissions.

Viewing a bulletin board's properties

You do not need to be logged into DocuShare to view a bulletin board's properties. However, only the owner of a bulletin board or a user with Writer access to the bulletin board can change the object's properties.

To view a bulletin board's properties:

1. Do one of the following:
   - If the bulletin board is open, click the **Properties** icon that appears to the right of the bulletin board's title.
   - If the bulletin board is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the bulletin board's title.

   The Properties page for the bulletin board appears, displaying the current properties. Table 7–2 describes each property.

Table 7–2: Bulletin board properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Handle	The object's unique identifier.
Owner	The name of the user who is the object's current owner and has Manager access to it. By default, the owner is the user who added the object to DocuShare.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.

Table 7–2: Bulletin board properties

Property	Description
Logo	The URL or handle of a GIF or JPEG image. The URL is any valid Internet address for an image file (for example, http://www.mycompany.com/images/image.gif) and the handle is the handle number of an image in a DocuShare repository (for example, Document-12). The image displays at the top of the bulletin board's page.
Background Image	The URL or handle of a GIF or JPEG image. The URL is any valid Internet address for an image file (for example, http://www.mycompany.com/images/image.gif) and the handle is the handle number of an image in a DocuShare repository (for example, Document-12). The image displays in the background of the bulletin board's page.
Bulletins Expire In	The length of time to retain bulletins in the bulletin board after they are added. When a bulletin becomes older than the selected duration, it no longer appears in the bulletin board. You can view and delete expired bulletins on the bulletin board's View Expired page.
Appears In	The collection(s) in which the object appears.

Changing a bulletin board’s properties

You can change a bulletin board’s properties if you are the logged-in owner of the bulletin board or a logged-in user with Writer access to the bulletin board.

To change a bulletin board’s properties:

1. Do one of the following:
   - If the bulletin board is open, click the **Properties** icon that appears to the right of the bulletin board’s title.
   - If the bulletin board is not open (you can view its title in a collection), click the **Properties** icon that appears to the right of the bulletin board’s title.

   The Properties page for the bulletin board appears.
2. Click the **Properties** tab.
3. Change the properties you want.

   See Table 7–2 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

4. Click **Apply** to save the changes.

Changing a bulletin board’s location

You can move a bulletin board to another collection or have the bulletin board appear in several collections on your site. Although a bulletin board can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a bulletin board’s location, you must be logged in and have Writer access to it.

To change a bulletin board’s location:

1. Navigate to and open the collection that contains the bulletin board whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the bulletin board’s title. From the **Edit Selected** menu, select **Change Location**.
   - Click the **Properties** icon that appears to the right of the bulletin board’s title. Click the **Locations** tab.

   A page appears, showing the bulletin board’s current location(s).
3. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
4. In the **Possible Locations** field, select the collection(s) in which you want the bulletin board to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Selected Locations** field, select any collections in which you do not want the bulletin board to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the bulletin board will become orphaned, which means it will not appear in any collection.

6. Click **Update Locations**.

   The Properties page for the bulletin board appears displaying the collection title(s) in which the bulletin board now appears.

Deleting a bulletin board

You can delete a bulletin board on your DocuShare site if you are the logged-in owner of the bulletin board or have Manager access to it. When you delete a bulletin board, all of its current and expired bulletins are also deleted.

To delete a bulletin board:

1. Navigate to and open the collection that contains the bulletin board you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the bulletin board's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the bulletin board's title. On the Properties page for the bulletin board, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the bulletin board, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the bulletin board from your site.

   If you do not want to delete the bulletin board, click **Cancel**.

Restoring a deleted bulletin board

If you accidentally delete a bulletin board, your administrator can restore it if the Trashcan is enabled on your site. The Trashcan holds deleted objects until your administrator expunges or restores the Trashcan contents. See your administrator to restore a deleted bulletin board.

Adding a bulletin to a bulletin board

You can add a bulletin to a bulletin board to which you have Writer access. You must also be logged in to DocuShare.

To add a bulletin:

1. Open the bulletin board to which you want to add a bulletin.
2. From the **Add** menu, select **Bulletin**.

   The Add Bulletin page appears.
3. In the **Title** field, enter a name for the bulletin.
4. Optionally, enter the bulletin text in the **Description** field. The description appears below the title in a bulletin board. You can include HTML tags in the bulletin's description.
5. For **Initial Permissions**, select one of the following:
   - **Same as container** assigns the container's access permissions to the object.
   - **Same as container except write restricted to owner** assigns the users who have Reader access to the container with Reader access to the object. You are the only user with Writer access to the object.
   - **Restricted to owner** assigns full access permissions only to you, the object's owner.
6. Click **Apply** to add the bulletin to your bulletin board.

   The Properties page for the bulletin appears, displaying information about the new bulletin.
7. You can click the bulletin board name displayed in the **Location** bread crumbs to see the bulletin.

   The bulletin you added appears first in the list of bulletins.

To change the bulletin's access permissions, see Chapter 5, Access permissions.

Changing a bulletin’s properties

You can change the properties of a bulletin if you are logged into DocuShare and have Writer access to the bulletin.

To change a bulletin’s properties:

1. Navigate to and open the bulletin board that contains the bulletin you want to change.
2. Click the **Properties** icon that appears to the right of the bulletin.

   The Properties page for the bulletin appears.
3. Click the **Properties** tab.
4. Make the changes you want on the Properties page.

   See Table 7–3 for a description of each property.

Table 7–3: Bulletin properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Description	A detailed description of the object. You can include HTML tags in the object’s description. The description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.

5. Click **Apply** to change the bulletin’s properties.

Deleting a bulletin

You can delete a bulletin if you have Manager access to it or you are the bulletin's owner. You also must be logged into DocuShare.

To delete a bulletin:

1. Navigate to and open the bulletin board that contains the bulletin you want to delete.
2. Do one of the following:
    - Click the **Properties** icon that appears to the right of the bulletin's title. At the bottom of the Properties page, click the **Delete** button.
    - Select the checkbox that appears next to the bulletin's title. From the **Edit Selected** menu, select **Delete**.

    The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the bulletin, then you do not have Manager access to the object and cannot delete it.

3. On the Confirm Delete page, click the **Delete** button.

    If you do not want to delete the bulletin, click **Cancel**.

Changing the location of a bulletin

You can move a bulletin to another bulletin board or have it appear in several bulletin boards. To move a bulletin, you must be logged into DocuShare and have Writer access to the bulletin.

Although a bulletin can appear in several bulletin boards, there is only one copy of it, which saves space on your DocuShare site.

To change the location of a bulletin:

1. Navigate to and open the bulletin board that contains the bulletin you want to move.
2. Click the **Properties** icon that appears to the right of the bulletin's title.

   The Properties page for the bulletin appears.
3. Click the **Locations** tab.

   The Locations page appears, showing the bulletin's current location(s).
4. Do one of the following:
   - To find specific bulletin boards, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all bulletin boards, click **Show All**.
5. In the **Possible Locations** field, select the bulletin board(s) in which you want the bulletin to appear and click the **Add** button. To select multiple bulletin boards, use the CTRL key (Windows) or the Command key (Macintosh).
6. In the **Selected Locations** field, select any bulletin boards in which you do not want the bulletin to appear and click the **Remove** button. To select multiple bulletin boards, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one bulletin board appears in the **Selected Locations** field. Otherwise, the bulletin will become orphaned, which means it will not appear in any bulletin board.

7. Click **Update Locations**.

Viewing and deleting expired bulletins

If you set an expiration for the bulletins added to a bulletin board, you can view and delete the expired bulletins. To delete expired bulletins, you must be logged in and have Manager access to the bulletins.

To view and delete expired bulletins:

1. Navigate to and open the collection that contains the bulletin board whose expired bulletins you want to view.
2. Click the **Properties** icon that appears to the right of the bulletin board's title.

   The Properties page for the bulletin board appears.
3. Click the **View Expired** tab.

   The page displays all of the expired bulletins that no longer appear on the bulletin board.
4. Do one of the following:
   - Select the individual bulletins that you want to delete.
   - Click **Select All** to select all of the bulletins.
5. Click **Delete Selected**.

8

DocuShare URLs

About DocuShare URLs

A DocuShare URL is a link to a Web page. Adding a URL to a collection enables you to easily share useful and interesting Web pages with other DocuShare users and guests.

Adding a URL

You can add a URL to a DocuShare collection if you are logged in and have Writer access to the collection.

To add a URL to a collection:

1. Navigate to and open the collection to which you want to add a URL.

   The collection page opens showing all of the objects in the collection.

2. From the **Add** menu, select **URL**.

   The Add URL page appears.

3. In the **URL** field, enter the Internet address of the Web page (for example, http://www.docushare.com).

   While viewing the Web page in a browser, you can copy the URL from the Address or Location field and paste it into the URL field.

4. In the **Title** field, enter a name for the URL. The name should be short, but descriptive, and can contain spaces and punctuation marks.

5. Enter any optional information. See Table 8–1 for a description of each property.

Table 8–1: Add URL properties

Property	Description
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object’s description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Initial Permissions	The access permissions assigned to the new object: **Same as container** assigns the container’s access permissions to the object. **Same as container except write restricted to owner** assigns the users who have Reader access to the container with Reader access to the object. You are the only user with Writer access to the object. **Restricted to owner** assigns full access permissions only to you, the object’s owner.

6. Click **Apply**.

   The Properties page for the URL appears, displaying information about the new URL.

7. You can click the collection name displayed in the **Location** bread crumbs to see the URL object.

To change the URL's access permissions, see Chapter 5, Access permissions.

Viewing a URL's properties

You do not need to be logged into DocuShare to view a calendar's properties. However, only the owner of a URL or a user with Writer access to the URL can change its properties.

To view a URL's properties:

1. Navigate to and open the collection that contains the URL whose properties you want to view.
2. Click the **Properties** icon that appears to the right of the URL's title.

   The Properties page for the URL appears displaying the current properties. Table 8–2 describes each property.

Table 8–2: URL properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Handle	The object's unique identifier.
Owner	The name of the user who is the object's current owner and has Manager access to it. By default, the owner is the user who added the object to DocuShare.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.
URL	The complete Internet address of a Web page. For example: http://www.website.com.
Appears In	The collection(s) in which the object appears.

Changing a URL's properties

You can change a URL's properties if you are the logged-in owner of the URL or a logged-in user with Writer access to the URL.

To change a URL's properties:

1. Navigate to and open the collection that contains the URL whose properties you want to change.
2. Click the **Properties** icon that appears to the right of the URL's title.

   The Properties page for the URL appears.
3. Click the **Properties** tab.
4. Change the properties you want. See Table 8–2 for a description of each property.

NOTE: If your administrator created custom properties, they also display on the page. See your administrator for information about custom properties.

5. Click **Apply** to save the changes.

Changing a URL's location

You can move a URL to another collection or have the URL appear in several collections on your site. Although a URL can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a URL's location, you must be logged in and have Writer access to it.

To change a URL's location:

1. Navigate to and open the collection that contains the URL whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the URL's title. From the **Edit Selected** menu, select **Change Location**.
   - Click the **Properties** icon that appears to the right of the URL's title. Click the **Locations** tab.

   A page appears, showing the URL's current location(s).
3. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
4. In the **Possible Locations** field, select the collection(s) in which you want the URL to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Selected Locations** field, select any collections in which you do not want the URL to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the URL will become orphaned, which means it will not appear in any collection.

6. Click **Update Locations**.

   The Properties page for the URL appears displaying the collection title(s) in which the URL now appears.

Deleting a URL

You can delete a URL on your DocuShare site if you are the logged-in owner of the URL or a logged-in user with Manager access to it.

To delete a URL:

1. Navigate to and open the collection that contains the URL that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the URL’s title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the URL’s title. On the Properties page for the URL, click the **Delete** button.

   The Confirm Delete page appears.

NOTE: If a minus sign appears in the checkbox that precedes the URL, then you do not have Manager access to the object and cannot delete it.

3. Click **Delete** to remove the URL from your site.

   If you do not want to delete the URL, click **Cancel**.

Restoring a deleted URL

If you accidentally delete a URL, your administrator can restore it if the Trashcan is enabled on your site. The Trashcan holds deleted objects until your administrator expunges or restores the Trashcan contents. See your administrator to restore a deleted URL.

9

DocuShare subscriptions

About subscriptions

A subscription allows you to be notified of a change to a DocuShare object. You can add a subscription for any object on your site. For example, you can add a subscription for a document to have DocuShare notify you when a new version of the document is added to a collection. You might want to add a subscription for a collection to know when new content is added to the collection.

DocuShare notifies you by email when a change occurs. You can choose to receive immediate notification or receive a summary report on a daily or weekly basis.

You can add a subscription for any of the following changes to an object:

Any change—Any change to an object.

Something added—A new object is added to a collection, bulletin board, or calendar.

New document version added—A new version of a document is added to a collection.

Something deleted—The object is deleted.

Properties edited—The object's properties are changed.

Permissions edited—The object's permissions are changed.

Change in ownership—The object's owner is changed.

Location edited—The object's location is changed.

Document locked or checked out—The document is locked or checked out.

Document unlocked—The document is unlocked after being locked, but a new version of it was not added.

NOTE: To use DocuShare subscriptions, your administrator must configure the server with an SMTP mail gateway for outgoing mail. Your user account properties must include an email address.

Adding a subscription

You can add a subscription for an object if you are logged in and have Writer access to the object. If the object is a collection, you can choose how to apply the subscription to the collection and the objects in it. If the object is a bulletin board or calendar, the subscription applies to the container and all of the objects in it.

To add a subscription:

1. Navigate to the object for which you want to add a subscription.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.
4. In the **Events of Interest** field, select one or more events. To select multiple events, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Period** field, select one of the following time periods:
   - **Immediate** provides notification immediately after the event occurs.
   - **Daily** provides notification in a daily summary report.
   - **Weekly** provides notification in a weekly summary report.
6. In the **Include Recipient Activity** field, select **Yes** to also notify the user whose action caused the subscription notification. Otherwise, select **No**.
7. Enter any optional information. See Table 9–1 for a description of each property.

Table 9–1: Add Subscription properties

Property	Description
External Recipients	The list of email addresses for recipients who are not registered users on the DocuShare server. When an event of interest occurs, an email message is sent to each recipient. This field appears if your site uses the Full Subscription add-on.
Sender	The username that appears in the email message From field: **Owner** or **Admin**.
Subscription Applies To	If the object is a collection, select how to apply the subscription to the collection and its contents: **This container and all levels of contents** applies the subscription to the collection and all of the objects in it. When a change occurs to any one of the collection's objects, DocuShare sends an email notification. **This container and immediate contents** applies the subscription to the collection and its first nested level of objects. For example, if a collection contains several objects and a sub-collection, DocuShare sends an email notification when a change occurs to any of the objects and the sub-collection; it does not send a notification when a change occurs to an object in the sub-collection.

8. Click **Apply**.

   The subscription does not appear as an object in a collection. Subscriptions appear on the object's Subscriptions page.

Viewing subscriptions and their properties

You must be logged into DocuShare and have Reader access to the object to view its subscriptions and their properties.

To view an object's subscriptions:

1. Navigate to the object whose subscriptions you want to view.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.

   A list of the object's current subscriptions display.
4. Click the **Properties** icon that appears to the right of the subscription whose properties you want to view.

   The Properties page for the subscription appears. See Table 9–2 for a description of each property.

Table 9–2: Subscription properties

Property	Description
Title	The title of the object. The title should be short, but descriptive, and can contain spaces and punctuation marks.
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object's description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.
Handle	The object's unique identifier.
Owner	The name of the user who is the object's current owner and has Manager access to it. By default, the owner is the user who added the object to DocuShare.
Create Date	The date and time when the object was added to DocuShare.
Modified Date	The date and time when the object was last changed.
Modified By	The name of the user who last changed the object.
Expiration Date	The date on which the object is no longer needed. You can search for expired objects and delete or archive them.

Table 9–2: Subscription properties

Property	Description
Events of Interest	The DocuShare events to which to subscribe. When one of these events occurs, DocuShare sends an email message.
Period	The time period at which to notify you when an event of interest occurs: **Immediate** provides notification immediately after the event occurs. **Daily** provides notification in a daily summary report. **Weekly** provides notification in a weekly summary report.
Include Recipient Activity	Notifies the user whose action caused the subscription notification. Setting this property to No prevents the user from receiving notification about an action he or she made.
External Recipients	The list of email addresses for recipients who are not registered users on the DocuShare server. This field appears if your site uses the Full Subscription add-on.
Sender	The username that appears in the email message From field: **Owner** or **Admin**.
Subscription Applies To	The collection objects to which the subscription applies: **This container and all levels of contents** applies the subscription to the collection and all of the objects in it. **This container and immediate contents** applies the subscription to the collection and its first nested level of objects.
Publisher	The title of the object for which the subscription was added.

Changing subscription properties

You must be the logged-in owner of a subscription or a logged-in user with Writer access to the subscription to change the subscription's properties.

To change an object's subscription properties:

1. Navigate to the object whose subscription properties you want to change.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.

   A list of the object's current subscriptions display.
4. Click the **Properties** icon that appears to the right of the subscription you want to change.

   The Properties page for the subscription appears.
5. Click the **Properties** tab.
6. Change the properties you want. See Table 9–2 for a description of each property.
7. Click **Apply**.

Creating a recipient list for a subscription

You can create a recipient list for a subscription to have DocuShare notify others when a change occurs to an object. For example, you may want co-workers to know when a new version of a document is added to a collection or when an object is moved to another location.

You must be the logged-in owner of a subscription or a logged-in user with Writer access to the subscription to create a recipient list.

To create a recipient list for a subscription:

1. Navigate to the object that has the subscription for which you want to create a recipient list.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.

   A list of the object's current subscriptions display.
4. Click the **Properties** icon that appears to the right of the subscription you want to change.

   The Properties page for the subscription appears.
5. Click the **Recipients** tab.
6. In the **Show** field, select the type of account you want to display in the **Possible Users/Groups** field.
7. Do one of the following:
   - To find a specific account, enter part of the user's first name, last name, or username or the group's title in the **Search** field. Click the **Go** button.
   - To display all accounts, click **Show All**.
8. In the **Possible Users/Groups** field, select the accounts to add to the recipient list and click the **Add** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
9. In the **Selected Users/Groups** field, select any accounts that you want to remove from the recipient list and click the **Remove** button. To select multiple accounts, use the CTRL key (Windows) or the Command key (Macintosh).
10. Click **Update**.

Deleting a subscription

You can delete a subscription if you are the logged-in owner of a subscription or a logged-in user with Manager access to the subscription.

To delete a subscription:

1. Navigate to the object whose subscription you want to delete.
2. Click the **Properties** icon that appears to the right of the object's title.

   The Properties page for the object appears.
3. Click the **Subscriptions** tab.

   A list of the object's current subscriptions display.
4. Click the **Properties** icon that appears to the right of the subscription you want to delete.

   The Properties page for the subscription appears.
5. Click the **Delete** button.

   The Confirm Delete page appears.
6. Click the **Delete** button.

Restoring a deleted subscription

If you accidentally delete a subscription, your administrator can restore it if the Trashcan is enabled on your site. The Trashcan holds deleted objects until your administrator expunges or restores the Trashcan contents. See your administrator to restore a deleted subscription.

10

DocuShare searches

About DocuShare searches

DocuShare search features enable you to quickly find objects on your site. You can perform simple word searches by having DocuShare find the objects that contain the text you specify. You also can combine several search terms to find specific objects, such as all documents authored by one user that contain the word DocuShare in their titles. When searching for objects, you can search all of the collections on the site or a single collection.

When an object is added to a collection, DocuShare indexes and stores in a database the object's properties (also called metadata) and, if the object is a document, its content. A search checks the database to find the objects that match your search terms. In addition, DocuShare uses a process called stemming to find objects that contain variations of the word you specify. For example, a search for the word **bath** will find the words **baths** and **bathes**.

Searching for objects

From the home page or any collection page you can search for objects and content. You do not need to be logged into DocuShare to run a search.

To search for objects:

1. On the home page or a collection page, enter one or more words in the **Search** field.

   If you want DocuShare to search for an exact phrase, enclose the phrase in quotation marks (“for example”).

2. If you are running the search from a collection page, do one of the following:
   - Click **This Collection** to search the current collection only.
   - Click **All Collections** to search the entire site.

3. Click the **Go** button.

   DocuShare displays the search results.

Running an advanced search

Using the Advanced Search page, you can search for specific objects, specify how search results are displayed, and combine search terms to narrow a search.

To run an advanced search:

1. On the home page or a collection page, click the **Advanced** link.
2. On the Query page, specify any of the following information:

   Search for—The word or words to search for.

   If you want DocuShare to search for an exact phrase, enclose the phrase in quotation marks (“for example”).

   Within—If you are running the search from a collection page, the scope of the search.

   Maximum Results—The maximum number of objects to display in the search results list. DocuShare orders the results by displaying the most relevant objects first.

   Sort Results—The order in which to display the search results.

   Object Type—The type of objects to search. **All** searches all objects.

   Document Type—Searches one type of document, as specified by its MIME type. For example, you can search Word documents only by selecting application/msword.

   To restrict the search to one **Document Type**, the **Object Type** must be set to **All** or **Document**.
3. Click the **Refine** tab.

   On the Refine page, you can combine several search terms to find fewer objects or very specific objects.
4. In the **Where** field, select which part of objects should be searched. **Any Part** searches both the object’s content and properties.
5. In the **Contains** field, enter the word or words to search for.
6. To add another search term, choose one of the logical operators.

   See Table 10–1 for a description of each logical operator.
7. Enter another search term in the next **Where** and **Contains** fields. You can specify up to four search terms.
8. Enter a date in any of the following fields:

   Create Date—Limits a search to a specific creation date; either on, after, or before a certain date (month/day/year).

   Expiration Date—Limits a search to a specific expiration date; either on, after, or before a certain date (month/day/year).

   Modified Date—Limits a search to a specific modification date; either on, after, or before a certain date (month/day/year).

   Last Login (User)—Limits a search to the date a user last logged into DocuShare; either on, after, or before a certain date (month/day/year).

9. Click the **Search** button.

   DocuShare displays the search results.

Table 10–1: Logical operators

Logical operator	Meaning
And	**Searches for objects that contain all of the search terms.** For example: Search for objects where "Title contains Training **And** Summary contains Basic Product." The search would return only objects that have the word "Training" in the Title, and the phrase "Basic Product" in the Summary.
Or	**Searches for objects that contain at least one of the search terms.** For example: Search for objects where "Title contains Advanced **Or** Summary contains Administrator." The search would return objects that have either the word "Advanced" in the Title or the word "Administrator" in the Summary, or both the word "Advanced" in the Title and "Administrator" in the Summary.
Accrue	**Searches for objects that contain at least one of the search terms, with the objects containing the larger number of search terms displayed first.** For example: Search objects where "Title contains Advanced **Accrue** Summary contains Administrator." The search would first return objects that have both Advanced in the Title and Administrator in the Summary, then objects that contain just one of the search terms (either Advanced in the Title or Administrator in the Summary).
And Not	**Searches for objects that contain one search term and not the other.** For example: Search objects where "Title contains Technology **And Not** Title contains Marketing." The search would return only those objects where Technology was in the Title, but not return objects if Marketing was also in the Title.

Using reserved characters in a search

You can use these wildcard characters when building a search:

Question mark ?—Specifies any single alphanumerical character.
For example: **?an** returns ban, can, dan, fan, etc.

Asterisk *—Specifies any number of alphanumerical characters.
For example: **corp*** returns corporate, corporation, corporal, corpulent, etc.

NOTE: To find objects that include a wildcard character, precede the character with two backslashes (\\). For example, to search for x*y, enter x*y.

To use any of the following characters in a search, you must precede the character with a backslash (\). Otherwise, the character is ignored and treated as a space.

comma ,
left and right parentheses ()
double quotation mark “
backslash \
at sign @
left curly brace {
left bracket [
less than sign <
apostrophe ‘
equal sign =
dash -
caret ^
pound sign #
exclamation point !

Saving a search query

A saved search query consists of a defined set of search terms. You can save a search in a collection to reuse it or to share it with other users. You can save a search query after running a search, or you can define a search query and save it.

To save a search query, you must be logged in.

To save the query used in a search:

1. Define your search terms and run a search.

   The search results display.
2. From the **Add** menu, select **Saved Query**.

   The Add Saved Query page appears.
3. In the **Title** field, enter a title for the saved query.
4. Enter any optional information. See Table 10–2 for a description of each property.

Table 10–2: Add Saved Query properties

Property	Description
Summary	A short description of the object. The summary appears below the object's title.
Description	A detailed description of the object. You can include HTML tags in the object’s description. For container objects, the description appears below the title.
Keywords	One or more words to associate with the object. Keywords help to categorize objects and can be used to find objects in a search. Separate keywords with a comma.

5. Click **Save Search**.

   The Properties page for the query appears. You need to add the saved query to a collection.
6. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
7. In the **Possible Locations** field, select the collection(s) in which you want the saved query to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
8. In the **Selected Locations** field, select any collections in which you do not want the saved query to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

9. Click **Update Locations**.

   DocuShare adds your search query to the collection. When you click the saved query, DocuShare runs the search using the saved search terms and displays the results.

To create a search query and save it:

1. Navigate to and open the collection in which you want to add a saved query.
2. From the **Add** menu, select **Saved Query**.

   The Add Saved Query page appears.
3. In the **Title** field, enter a title for the saved query.
4. Enter any optional information. See Table 10–2 for a description of each property.
5. Specify the search terms you want.
6. Click the **Apply** button.

   DocuShare saves your search query in the collection. When you click the saved query, DocuShare runs the search using the search terms and displays the results.

Changing a saved query's properties

You can change the properties and search terms of a saved query if you are the logged-in owner of the query, or you are logged in and have Writer access to it.

To change a saved query's properties:

1. Open the collection that contains the saved query whose properties you want to change.
2. Click the **Properties** icon that appears to the right of the saved query's title.

   The Properties page for the saved query appears, displaying the current properties.
3. Click the **Properties** tab.
4. Change the properties you want.
5. Click **Apply**.
6. Click the **Edit Query** tab.
7. Change the search terms you want.
8. Click **Apply**.

   DocuShare saves the changes to the saved query.

Changing a saved query's location

You can move a saved query to another collection or have the saved query appear in several collections on your site. Although a saved query can appear in several collections, there is only one copy of it, which saves space on your DocuShare site.

To change a saved query's location, you must be logged in and have Writer access to it.

To change a saved query's location:

1. Navigate to and open the collection that contains the saved query whose location you want to change.
2. Do one of the following:
   - Click the checkbox that appears to the left of the saved query's title. From the **Edit Selected** menu, select **Change Location**.
   - Click the **Properties** icon that appears to the right of the saved query's title. Click the **Locations** tab.

   A page appears, showing the saved query's current location(s).
3. Do one of the following:
   - To find specific collections, enter one or more words in the **Search** field. Click the **Go** button.
   - To display all collections, click **Show All**.
4. In the **Possible Locations** field, select the collection(s) in which you want the saved query to appear and click the **Add** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).
5. In the **Selected Locations** field, select any collections in which you do not want the saved query to appear and click the **Remove** button. To select multiple collections, use the CTRL key (Windows) or the Command key (Macintosh).

NOTE: Make sure at least one collection appears in the **Selected Locations** field. Otherwise, the saved query will become orphaned, which means it will not appear in any collection.

6. Click **Update Locations**.

   The Properties page for the saved query appears displaying the collection title(s) in which the saved query now appears.

Deleting a saved query

You can delete a saved query if you are the logged-in owner of the query or a logged-in user with Manager access to it.

To delete a saved query:

1. Open the collection that contains the saved query that you want to delete.
2. Do one of the following:
   - Click the checkbox that appears next to the saved query's title. From the **Edit Selected** menu, select **Delete**.
   - Click the **Properties** icon that appears to the right of the saved query's title. On the Properties page for the saved query, click the **Delete** button.

   The Confirm Delete page appears.
3. Click **Delete** to remove the saved query from your site.

   If you do not want to delete the saved query, click **Cancel**.

Restoring a deleted saved query

If you accidentally delete a saved query, your administrator can restore it if the Trashcan is enabled on your site. The Trashcan holds deleted objects until your administrator expunges or restores the Trashcan contents. See your administrator to restore a deleted saved query.

11

Routing documents

About routing documents

During a document’s development cycle, you often need to solicit feedback from others, receive approval of the document’s content, or simply share the information in the document. DocuShare enables you to automate the routing of documents to users and request a specific action after the users receive the documents.

On a form called a Routing Slip, you indicate the users to whom the document should be sent, the type of action you want the users to take, and a message describing the document task. You then submit the Routing Slip; DocuShare notifies the specified users of the document task. While a task is in progress, you can monitor its status.

Routing a document

You can route a document that is stored in a collection on your site or you can choose to route a document when adding it to a collection. On the Routing Slip that accompanies the document, you can request users to approve the document, review the document and provide changes, or acknowledge receipt of a document sent for information only.

When routing a document from the Add Document page, you can choose to add the document to the collection before routing it or route the document and then add it to the collection after the routing task is complete (the document will not appear in the collection until you “publish” it).

To route a document stored on your site:

1. Do one of the following:
   - Navigate to the collection that contains the document you want to route.
   - Run a search to find the document you want to route.
2. Click the **Routing** icon that appears to the right of the document’s title. A **Routing** icon does not appear if the document is locked.

   The Route Documents window appears.
3. Under **Recipients**, click the **Add** button.
4. In the DocuShare Users window, place a check mark next to each user to whom you want to route the document.
5. Click the **Add** button.
6. Under **Action**, choose one of the following:
   - **For Approval**—Requires users to approve or not approve the document. Select **In Order** to route the document to users in the order in which they are listed in the **Recipients** field. If a user does not approve the document, it is not routed to subsequent users. Select **At the Same Time** to route the document to all users simultaneously.
   - **For Review**—Allows users to provide comments and a revised version of the document. The document is routed to all users at the same time.
   - **For Information**—Provides the document to users for information only. The document is routed to all users at the same time.
7. Under **Notify Me**, choose any of the following:
   - **Of Progress**—Notifies you of the routing process after each user action.
   - **On Completion**—Notifies you when the routing process is complete.
   - **If Not Completed By**—Notifies you if the routing task is not complete by the date you enter in the field. Either enter a date in the field or click the **Calendar** icon and select a date.

   You click the **My Tasks** link on the navigation bar to check for notifications.

8. Under **Message**, do the following:
   - In the **Subject** field, enter a brief topic that appears in the notification or email that the user receives.
   - In the **Comments** field, enter a message.
9. Click **Submit**.

   The Route Documents window closes.

To route a new document:

1. Navigate to and open the collection to which you want to add a document.
2. From the **Add** menu, select **Document**.

   The Add Document page appears.
3. Enter the required and any optional information.
4. For **Document Routing**, select one of the following:

   Route the document and publish it later—Allows you to route the document to other users before adding it to the collection. When the routing task is complete, you must publish the document to add it to the collection. See Checking the status of routing tasks you assigned on page 11–9.

   Publish and then route the document—Adds the document to collection and then displays a Routing Slip so you can route the document to other users.
5. Click the **Apply** button.

   The Route Documents window appears.
6. Under **Recipients**, click the **Add** button.
7. In the DocuShare Users window, place a check mark next to each user to whom you want to route the document.
8. Click the **Add** button.
9. Under **Action**, choose one of the following:
   - **For Approval**—Requires users to approve or not approve the document. Select **In Order** to route the document to users in the order in which they are listed in the **Recipients** field. If a user does not approve the document, it is not routed to subsequent users. Select **At the Same Time** to route the document to all users simultaneously.
   - **For Review**—Allows users to provide comments and a revised version of the document. The document is routed to all users at the same time.
   - **For Information**—Provides the document to users for information only. The document is routed to all users at the same time.
10. Under **Notify Me**, choose any of the following:
    - **Of Progress**—Notifies you of the routing process after each user action.
    - **On Completion**—Notifies you when the routing process is complete.
    - **If Not Completed By**—Notifies you if the routing task is not complete by the date you enter in the field. Either enter a date in the field or click the **Calendar** icon and select a date.

You click the **My Tasks** link on the navigation bar to check for notifications.

11. Under **Message**, do the following:
    - In the **Subject** field, enter a brief topic that appears in the notification or email that the user receives.
    - In the **Comments** field, enter a message.
12. Click **Submit**.

    The Route Documents window closes.

Changing the recipient list

Recipients appear in the Route Documents window in the order in which you add them. When you route a document for approval in order, it is sent to the recipients in the order in which their names appear in the window. You can change the order of the recipients in the list, and you can add and remove recipients.

To reorder a recipient:

1. In the Route Documents window, select the name of the user you want to move.
2. To move the user before another user, click the **Move Up** button.
3. To move the user after another user, click the **Move Down** button.

To add recipients:

1. In the Route Documents window, click the **Add** button.
2. In the DocuShare Users window, place a check mark next to each user that you want to add.
3. Click the **Add** button.

   The users you added appear in the **Recipients** field.

To remove recipients:

1. In the Route Documents window, select the name of the user you want to remove from the list.
2. Click the **Remove** button.

NOTE: You can click the **Remove All** button to remove all the recipients from the list.

Adding documents to the Routing Slip

Before submitting a Routing Slip, you can include additional documents to be routed. You can add a document from a collection and from the Add Document page.

To add a document to a Routing Slip:

1. Do one of the following:
    - Navigate to the collection that contains another document that you want to route and click the document's **Routing** icon.
    - In an Add Document window, enter the document filename and title, and then select either **Route the document and publish it later** or **Publish and then route the document**.
2. In the confirmation window, click **OK**.
3. In the Route Documents window, click the **Routed Documents** button.

    The document you added appears in the Routed Documents window.
4. Click the **Close** button.

If you want to remove a document from the Routed Documents window, select the document and click the **Remove** button. You can also click **Remove All** to remove all of the documents from the window.

Saving a Routing Slip

You can save a Routing Slip that you plan to use frequently. Saved Routing Slips are available to all DocuShare users, which enables you to share recipient lists and routing tasks.

To save a Routing Slip:

1. In the Route Documents window that shows the Routing Slip that you want to save, click the **Save As** button.
2. In the window, enter a name for the Routing Slip and click **OK**.
3. If a Routing Slip with the same name has already been saved, do one of the following:
   - Click **Yes** to replace the existing Routing Slip.
   - Click **No** to save the current Routing Slip with a different name.

Using a saved or current Routing Slip

You can re-use any of the Routing Slips that you and other users have saved. You can also use a Routing Slip for a task in progress.

To use a saved or current Routing Slip:

1. In a Route Documents window, click the **Use Routing Slip** button.

   The Routing Slips window appears.

2. Do one of the following:

   - To use a saved Routing Slip, click **All Saved Routing Slips** and select the Routing Slip that you want to use.
   - To use one of your current Routing Slips, click **My Routing Slips In Use** and select the Routing Slip that you want to use.

   The window closes and the routing information displays in the Route Documents window.

3. As needed, change any of the routing settings.
4. Click **Routed Documents** to add or remove documents for routing.
5. Click **Submit**.

NOTE: You can delete saved Routing Slips that you no longer want by selecting the Routing Slip's checkbox and clicking the **Delete** button.

Checking the status of routing tasks you assigned

You can check the status of completed and pending routing tasks that you assigned to other users. Once a task is complete, you can choose to delete it, keep a record of it, or publish the document to add it to the collection.

To check the status of a routing task:

1. On the DocuShare navigation bar, click **My Tasks**.

   The My Tasks window appears.

2. Click the **Assigned by Me** tab.

   The page lists the routing tasks, under Description, the date the task began, and the status. Table 11–1 describes the status information.

Table 11–1: Task status

Status	Description
Approved	The task is complete and all recipients approved the document(s).
Disapproved	The task is complete and all recipients did not approve the document(s).
Reviewed	The task is complete and all recipients reviewed the document(s).
Delivered	The task is complete and all recipients received the document(s) for their information.
Started	The task is pending. It is currently being routed to all recipients at the same time for approval, review, or information. If the task is overdue, the word Overdue appears after the task's description.
Terminated	The task is stopped because it cannot continue. This can occur when a document or user is deleted from your site.
Username	The task is pending. It is currently being routed from recipient to recipient for approval. The user whose name is displayed has received the document, but has not approved or disapproved the document. If the task is overdue, the word Overdue appears after the task's description.

3. To view more information about the task, click the task's description.

   A Report on Routing window appears, which shows the status of each user assigned the task.

4. Do one of the following:
   - To view an individual recipient's comments, click the user's name.
   - To view all recipient comments, click **Show all User Comments**. If you want, you can save the comments to a text file.

   Close the window after viewing the comments.
5. To view the user's changes to the document, click the document's title.
6. Close the document after viewing the changes. Then close the Response to Routing window.
7. If the task is complete, do one of the following:
   - To remove a task from the Assigned by Me list, click **Delete This Job**.
   - To keep a record of the completed task, click **Keep for Later**. The task remains in the Assigned by Me list.
   - To publish a document that has not been added to a collection (the word Unpublished appears after the document's title), click the **Properties** icon that appears to the right of the document's title. At the bottom of the Properties page, click the **Publish This Version** button.

Viewing progress reports

If you chose to be notified of a task's progress, completion, or overdue status on the Routing Slip, you can view the notifications in the Routing Tasks window.

To view a task's progress report:

1. On the DocuShare navigation bar, click **My Tasks**.

   The My Tasks window appears.
2. Click the **Assigned to Me** tab.

   The page lists the routing tasks, under Description, the date the task was assigned, and the type of report. Table 11–2 describes the report types.

Table 11–2: Report type

Type	Description
Completion	The task is complete.
Response	The recipient responded to the task.
Overdue	The task is in progress past the completion date.
Unpublished	The routed document has not been added to the collection.
Terminated	The task is stopped because it cannot continue. This can occur when a document or user is deleted from your site.
Request	A routing task sent to you by another user. See section, Viewing the tasks assigned to you on page 11–12.

3. To view a task's progress report, click its Description.

   A Response to Routing window appears, which includes the routed document and shows the user's comments.

4. To view the user's changes to the document, click the document's title.

   You can save the user's revised document as a new version of your routed document. See the next section, Publishing a new version of your routed document on page 11–11.

5. Close the document after viewing the changes.

6. In the Response to Routing window, do one of the following:

   - To schedule a new due date for an overdue task, enter a new date in the **Due Date** field and click the **Acknowledged** button.
   - To complete the task, click the **Acknowledged** button.
   - To not complete the task at this time, click the **Acknowledge Later** button.

Publishing a new version of your routed document

If you routed a document for review, you can save a document that a recipient changed as a new version of your routed document. In the For Your Review window, the word New appears after the title of a document that a recipient changed.

To publish a new version of your routed document:

1. In the My Tasks window, click the **Assigned by Me** tab.
2. Under **Description**, click the task that includes the changed document.
3. In the Report on Routing for Review window, click the name of the recipient who provided the changed document.
4. Click the document title to open it.
5. Save the document to a location on your computer, and then close the document window.
6. In the Report on Routing for Review window, click the **Close** button.
7. Click the **Properties** icon that appears to the right of the document's title.
8. At the bottom of the Properties page, click the **Publish New Version** button.
9. On the Add Version page, click the **Browse** button.
10. Navigate to the location on your local drive in which you saved the document in step 5, select it, and click **Open**.

    The path to the document appears in the **Filename** field.

11. Enter an optional version comment in the **Version Comments** field.
12. Click **Apply**.
13. Close the Properties window.
14. In the Report on Routing for Review window, click the **Delete This Job** button.

Viewing the tasks assigned to you

The tasks assigned to you display in the My Tasks window. If you chose to receive an email message when a new task is assigned to you, the message includes a URL to the task.

NOTE: To receive an email message when a new task is assigned to you, your user account property **Routing Task Notification** must be set to **Email**.

To view the tasks assigned to you:

1. On the DocuShare navigation bar, click **My Tasks**.

   The My Tasks window appears.

2. Click the **Assigned to Me** tab.

   The page lists the routing tasks, under Description, the type of task, and the date the task was assigned. If the task type is **Request**, it is a routing task sent to you by another user.

3. To view a task, click its Description.

   A window appears displaying your task. The following sections describe how to respond to routing tasks.

Approving or disapproving a document

1. In the For Your Approval window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

2. Review the document.
3. When your review is complete, close the document.
4. You can repeat steps 1 through 3 for each routed document.
5. In the **Comments** field, enter an optional message.
6. Do one of the following:
   - To complete the task and approve the document, click the **Approved** button. The task is removed from the Assigned to Me page.
   - To complete the task but not approve the document, click the **Disapproved** button. The task is removed from the Assigned to Me page.
   - To not complete the task at this time, click the **Respond Later** button. The task remains on the Assigned to Me page.

Reviewing a document

1. In the For Your Review window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

2. Review the document and make any changes you want.
3. Close the document and, if you made changes, save it to a location on your computer.
4. If you changed the document, do the following:
   - Click the **Properties** icon that appears to the right of the document's title.
   - At the bottom of the Properties page, click the **Add Draft Version** button.
   - On the Add Version page, click the **Browse** button.
   - Navigate to and select the document you changed, and then click **Open**.
   - On the Add Version page, click **Apply**.
   - On the Properties page, click the **For Your Review** link in the **Location** path.
5. You can repeat steps 1 through 4 for each routed document.
6. In the **Comments** field, enter an optional message.
7. Do one of the following:
   - To complete the task and remove it from the Assigned to Me page, click the **Reviewed** button.
   - To not complete the task at this time, click the **Review Later** button. The task remains on the Assigned to Me page.

Acknowledging receipt of a document

1. In the For Your Information window, click the document's title.

   The document opens in its native editor or a window appears allowing you to download the document.

2. When you are finished viewing the document, close it.
3. You can repeat steps 1 and 2 for each routed document.
4. In the **Comments** field, enter an optional message.
5. Do one of the following:
   - To complete the task and remove it from the Assigned to Me page, click the **Acknowledged** button.
   - To not complete the task at this time, click the **Acknowledge Later** button. The task remains on the Assigned to Me page.

Viewing a document’s routing tasks

Any user can view the routing tasks that are in progress for a document.

To view a document’s routing tasks:

1. Do one of the following:
   - Open the collection that contains the document whose tasks you want to view.
   - Open a routing report or request window that contains the document whose tasks you want to view.
2. Click the **Properties** icon that appears to the right of the document’s title.

   The Properties page for the document appears.
3. Click the **Routing** tab.

   The tasks and their status display.

12

Scanning documents

About scanning documents

If you have access to a Xerox Document Centre with the Scan to File feature enabled, you can scan documents to DocuShare. The Document Centre converts your printed documents to TIFF format and stores the digital documents in a temporary collection on your DocuShare server. You can save your scanned documents to a permanent collection on your site.

Scanning a document at a Document Centre

Your Document Centre administrator must set up a scan template before you can scan documents to DocuShare. When setting up a scan template, the administrator can choose to save each document page to a TIFF file or to save all of the document pages to a single TIFF file. Check with your administrator to find out which template you should use and whether or not a password is required.

NOTE: Depending on which Document Centre model you use, the steps for scanning a document can vary.

To scan a document:

1. Place a document on the document glass or in the document feeder.
2. Press the Features button.
3. On the touch screen, press the Scan tab.
4. Press Scan to File.
5. Select the scan template.
6. If the template requires a password, do the following:
   - Press Added Features.
   - Press Filing Setups.
   - Press Login Name/Password.
   - Press Password.
   - Type your password and press Save.
   - Press Save.
7. Press the Start button.

The Document Centre scans the document and then sends it to the temporary scan collection on your DocuShare server. The document is stored in this collection for a designated time period. You can check the time period by clicking **Document Centre Scans** on the DocuShare home page. To keep the document, you need to save it to a permanent collection.

Saving a scanned document to a collection

To save a scanned document to a collection, you must be logged in and have Writer access to the collection.

To save a scanned document to a collection:

1. Go to the DocuShare home page.
2. Under **Related Links**, click **Document Centre Scans**.
3. If the **Passcode** field appears, enter the password you entered at the Document Centre to scan the document and then click **Update**.
4. Locate your scanned document.
5. Click **Save**.

   If you do not want to save the document to a collection, click **Delete** to remove the document from the temporary scan repository.
6. If you want to rotate the document, select a rotation and click **Do Rotate**.
7. In the **Destination** field, select the collection to which you want to save the document.
8. In the **Title** field, enter a title for the document.
9. Enter any additional information.
10. Select **Email the new URL to me** if you want to receive an email message with a link to the document.
11. Click **Save**.

    The document is saved to the collection you specified.

NOTE: Your administrator may have given you access to a collection named **Temporary Scan Repository**. Alternatively, you can open this collection to move or delete your scanned document.

13

Troubleshooting

Solving common problems

This section provides solutions to some common problems you might have while using DocuShare.

Table 13–1: Troubleshooting

Problem	Solution
I cannot create an account on DocuShare	Your administrator may have restricted account creation to either registered users or an administrator. Check with your DocuShare administrator.
I cannot log into DocuShare.	Make sure you are using a browser that supports logging into a system. Use Internet Explorer 4.x or higher, or Netscape Navigator 4.x or higher. Also, make sure your browser is set to accept cookies. This problem can also occur when your browser is not set to refresh the page with every visit to it. In this case, you are actually logged in, but are seeing an out-of-date page.
I forgot my DocuShare username.	On the navigation bar, click the **Users & Groups** link. Click **List Users** and then click your name. The **Username** field on the Properties page displays your username.
I forgot my DocuShare password.	Do not create another user account. Contact your DocuShare administrator, who can set another password for you.
Netscape hangs when I try to upload a document to DocuShare.	Check to see if the document is open in its associated application (for example, Word or PowerPoint). If it is, close the document and try the upload again. (This is a suspected bug in the Netscape-Windows interaction.)
I uploaded a document to DocuShare. Everything seemed to work properly, but my document is not there.	Check your browser's proxy settings. You should not be using a proxy server to access your DocuShare server.
I uploaded a document to DocuShare and received an error saying it had an invalid index or was unable to open the collection.	If you return to the collection to which the document was added, you should find that it was correctly uploaded. If so, the problem was with the search indexing step that occurs after your document has been uploaded. The document is stored but not indexed. Report the problem to your administrator.

Table 13–1: Troubleshooting

Problem	Solution
When I click the title of a document in DocuShare, I get the message "Unknown File Type - You have started to download a file of type application/...."	Make sure your browser is configured to use a helper application to view this type of document.
I am using Internet Explorer. When I click a PDF file in DocuShare, I just get a blank page. The file does not seem to open.	This is a known interaction problem between Internet Explorer and Acrobat (PDF) files. Contact your administrator for help.
I added HTML markup to an object's properties and now the page does not display properly.	DocuShare allows you to put HTML markup in text-based properties such as an object's Description or Summary. You should limit use of HTML to simple formatting commands like font changes and lists. Including header commands like <HTML>, <HEAD>, or <BODY> will most likely interfere with DocuShare's own HTML commands, leaving a page that is either blank or very poorly formatted. You should also avoid using any markup in Title and Summary properties that affects the vertical layout, such as IMG and list directives, because those two properties are displayed in contexts that assume simple strings.
I cannot find an object or a document.	DocuShare provides a variety of search features to help you quickly find objects. See Chapter 10, DocuShare searches, for information on how to run a search.
I am logged into DocuShare and when I try to access an object, I receive a message that says "Not Authorized."	Contact the object's owner, who can give you access.
I accidentally deleted a collection without deleting the objects it contained. Now I cannot find those objects.	When you delete a collection, but not its contents, and the objects are not located in another collection, they become orphaned. You are unable to access orphaned objects from a collection. However, the objects are still stored on your site. Your administrator can relocate orphaned objects in a collection so you can access them again. Or, you can access an orphaned object if you know its unique address (for example, http://sales.acme.com/docushare/dsweb/Get/Document-128).

Table 13–1: Troubleshooting

Problem	Solution
I moved a collection to a new location. Now I cannot find the collection in the new location or the old location.	You accidentally orphaned the collection, which means you cannot access it from another collection. The collection is still stored in DocuShare. Your administrator can recover the orphaned collection by relocating it in a collection. Or, you can access the collection if you know its unique address (for example, http://sales.acme.com/docushare/dsweb/Get/Collection-12).
I deleted an object from a collection, but when I navigate to the collection page I still see the object	If you used the browser's Back button, Favorites, or Bookmarks to navigate, you may have accessed a cached version of the collection page. Click the browser's Refresh or Reload button to display the latest version of the page.
I logged into DocuShare, navigated the site, and then used my browser's Back button a few times. Now I am logged in as a Guest.	You have accessed a cached version of the page. Click the browser's Refresh or Reload button to display the latest version of the page. You should see your username on the navigation bar.

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